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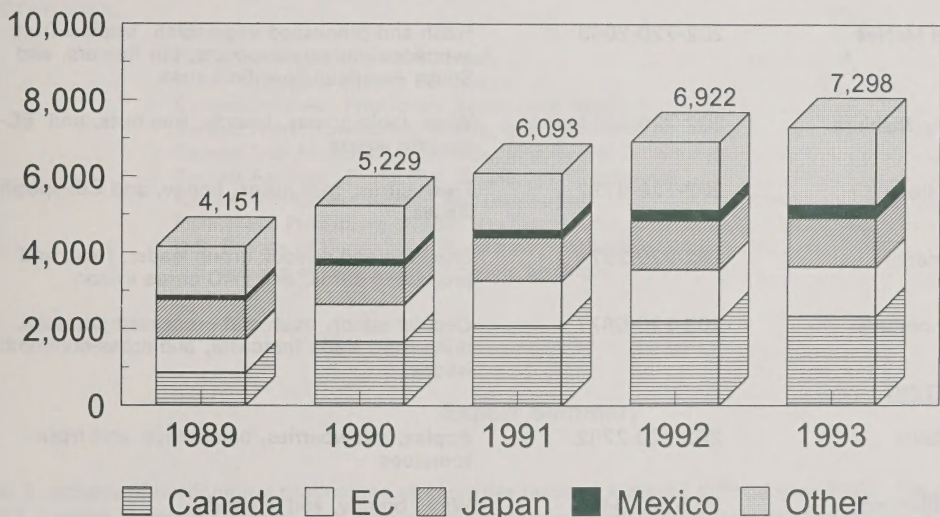
Foreign
Agricultural
Service

Circular Series
FHORT 12-93
December 1993

Horticultural Products Review

1993 Marks Another Record Year For U.S. Horticultural Exports

(Million \$)



Source: U.S. Bureau of the Census
1/ Fiscal Year 1993 - October 1992 to September 1993

Fiscal year 1993 marks the ninth consecutive year that U.S. horticultural exports have reached a record level, with exports increasing over 5 percent to \$7.3 billion. Increased exports to Mexico, Canada, and Japan more than offset a 2-percent decline to the European Community, which experienced bumper deciduous fruit crops. Commodities contributing to the export increase included fresh oranges, fresh and processed vegetables, frozen french fries, hops, and ginseng (formerly classified as a tropical product, now included in the horticultural export total).

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ANALYSIS

Kelly Kirby Flowers	202-720-4620	Fresh deciduous fruit, apple juice, olives, and Asia-specific issues
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Craig Jenkins	202-720-6086	Canada-specific issues, berries, and PL-480
Ross Kreamer	202-720-9903	Canned deciduous fruit, kiwifruit, beer, hops, NAFTA, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, tropical fruit, avocados, nursery products, cut flowers, and South American-specific issues
Katherine Nishiura	202-720-0911	Wine, table grapes, brandy, tree nuts, and EC-specific issues
Samuel Rosa	202-720-9792	Fresh citrus, fruit juices, honey, and CBI-specific issues
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, and FAO citrus liaison
Mark Thompson	202-720-6877	Circular editor, fresh and processed potatoes, dried fruit, trade forecasts, and cross-commodity issues

MARKETING

Laura Davis	202-720-2252	Apples, strawberries, blueberries, and fresh tomatoes
Ted Goldammer	202-720-8498	Wine, brandy, and almonds
Jean Harman	202-720-0897	Fresh and canned pears, canned peaches, fresh cherries, honey, hops, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, pistachios, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, concord grapes, peaches, pears, plums, and cranberries
Steve Shnitzler	202-720-8495	Walnuts, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

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Export Summary

U.S. exports of horticultural products to all countries reached a record in fiscal year 1993. Total exports were \$7.3 billion, 5 percent greater than a year ago. Increases in fresh and processed vegetables more than offset decreases in fresh and processed fruit and tree nuts. Exports in September 1993 were up by 7 percent from the same month a year ago. Fresh and processed vegetables accounted for most of the increase.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) =
26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
SEPTEMBER 93

NAME		QUANTITY				VALUE (1,000 DOLLARS)						
GROUP	COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TDATE LAST YR	YR TDATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	
FR, FRUIT CITRUS MT												
	GRAPEFRUIT	4,081	7,846	446,561	444,767	446,561	2,245	4,283	245,552	222,290	245,552	
	LEMONS	9,033	6,691	131,118	127,336	131,118	7,188	5,103	110,821	99,698	110,821	
	ORANGES, INCL TMPLS	23,689	21,890	479,107	562,596	479,107	11,246	14,422	259,388	279,503	259,388	
	OTHER CITRUS	252	251	24,990	19,313	24,990	252	190	22,039	16,507	22,039	
	Subtotal:-----	37,057	36,680	1,082,376	1,154,014	1,082,376	20,932	27,999	637,801	618,001	637,801	
FR, FRT, NON-CIT MT												
	APPLES	38,471	33,200	530,070	487,808	530,070	26,622	23,216	333,869	297,141	333,869	
	AVOCADOS	201	592	6,945	14,850	6,945	7,341	9,360	9,360	14,223	10,185	
	CHERRIES SWT & TRT	96	135	31,006	25,747	31,006	353	184	105,128	111,252	105,128	
	GRAPES	49,686	55,798	218,374	184,774	218,374	44,393	54,442	228,295	215,189	228,295	
	KIWIFRUIT	18	61	301,484	8,959	7,484	32	91	14,380	14,380	14,380	
	MELONS	17,785	19,125	189,266	196,473	189,266	7,263	7,028	69,605	74,192	69,605	
	PAPAYA	558	570	8,389	7,596	8,389	998	1,067	13,937	14,151	13,937	
	PEACHES & NCTRNS	6,130	9,751	113,375	63,998	71,411	4,759	6,648	58,600	57,507	58,600	
	PEARS	10,220	10,707	119,375	98,815	119,375	6,070	6,222	69,858	60,258	69,858	
	PLUMS/PRUNES	8,734	9,443	68,270	56,959	68,270	6,465	7,130	52,221	52,120	52,221	
	STRAWBERRIES	3,716	4,292	46,879	45,415	46,879	10,116	8,583	85,941	77,412	85,941	
	OTHER FRT, CITRUS	6,327	7,892	51,748	45,415	6,327	6,327	58,135	53,860	58,135	53,860	
	Subtotal:-----	140,947	150,972	1,348,624	1,243,586	1,348,624	113,155	121,595	1,099,340	1,039,381	1,099,340	
CND/PRP FRUIT MT												
	CHERRIES TRT CND	957	661	7,315	7,322	7,315	1,613	1,146	13,528	12,632	13,528	
	FRT MIXTURES	4,205	2,686	33,574	35,007	33,574	3,613	3,225	36,262	39,597	36,262	
	MARACHINO CHRY	736	776	4,090	4,912	4,090	767	1,529	8,146	9,706	8,146	
	PEACHES CANNED	1,700	1,939	19,298	21,390	19,298	1,400	1,951	18,738	20,960	18,738	
	PINEAPPLE CANNED	504	283	6,909	4,295	6,909	433	257	5,914	3,931	5,914	
	FRT PRP/PRPS	5,950	5,297	62,594	61,466	62,594	6,869	6,437	71,826	75,437	71,826	
	OTHER CANNED FR	1,057	2,358	39,248	39,248	1,057	2,358	39,248	39,248	39,248	39,248	
	Subtotal:-----	15,612	14,003	173,351	166,641	173,351	17,216	16,734	193,558	192,895	193,558	
DRIED FRUIT MT												
	PRUNES, DRIED	7,890	5,811	90,972	84,752	90,972	11,523	12,188	131,721	137,529	131,721	
	RAISINS, DRIED	15,609	12,902	129,867	121,529	129,867	22,042	20,664	182,796	180,885	182,796	
	OTHER DRIED FRUIT	1,430	1,933	23,341	19,865	23,341	4,428	5,666	53,392	49,237	53,392	
	Subtotal:-----	24,930	20,647	244,180	226,148	244,180	37,994	38,519	367,910	367,651	367,910	
FROZEN FRUIT MT												
	BLUEBERRIES, FZN	504	671	6,923	8,600	6,923	1,024	1,060	13,181	15,058	13,181	
	STRAWBERRIES, FZN	1,505	2,413	13,759	16,017	13,759	1,794	3,275	17,206	20,864	17,206	
	OTHER FZN FRUIT	1,889	1,432	19,193	16,231	19,193	2,718	2,254	25,351	23,726	25,351	
	Subtotal:-----	3,899	4,517	39,876	40,849	39,876	5,537	6,589	55,739	59,649	55,739	
FRT&VEG JUICE (SSE) KL												
	GRAPEFRUIT JU CNC	4,154	3,135	59,350	60,686	59,350	2,729	1,907	37,391	36,980	37,391	
	ORANGE JU MT CNC	6,875	7,613	67,167	92,128	67,167	2,562	5,143	58,786	68,746	58,786	
	ORANGE JUICE CNC	25,185	24,653	338,088	349,883	338,088	10,495	10,187	147,235	140,737	147,235	
	OTHER JUICES	32,448	31,122	394,724	363,216	394,724	17,749	18,053	223,707	214,146	223,707	
	Subtotal:-----	68,663	66,524	859,930	866,115	859,930	36,536	35,291	467,121	460,611	467,121	
VEGETABLES FR MT												
	ASPARAGUS, FR, CHLD	133	221	19,119	21,288	19,119	487	931	54,583	62,514	54,583	
	BROCCOLI	3,825	4,239	89,098	102,948	89,098	2,844	3,192	55,881	69,469	55,881	
	CAULIFLOWER	3,258	3,878	73,080	70,346	73,080	2,065	2,597	48,508	49,628	48,508	
	CELERY	3,421	3,670	115,121	115,257	115,121	1,368	1,408	39,423	51,058	39,423	
	LETTUCE, FR, CH	16,067	20,121	301,927	315,002	301,927	8,748	10,292	126,900	154,873	126,900	
	ONIONS, FR	19,057	20,206	156,657	183,005	156,657	5,892	6,927	55,464	71,840	55,464	
	PEPPERS	2,514	2,607	83,718	60,961	83,718	1,286	1,826	45,646	48,485	45,646	
	TOMATOES, FR, CH	9,505	12,342	154,328	167,132	154,328	1,586	6,291	118,604	133,834	118,604	
	OTHER VEG, FR	26,893	31,625	615,885	638,995	615,885	17,356	19,472	317,787	355,598	317,787	
	Subtotal:-----	84,676	98,911	1,608,938	1,675,138	1,608,938	45,636	54,939	863,190	997,304	863,190	
VEGETABLES CANNED MT												
	CATSUP & CHILI SA	1,827	2,061	23,237	23,641	23,237	1,373	1,661	18,147	18,526	18,147	
	SWEET CORN CANNED	11,579	15,144	136,132	176,881	136,132	8,782	11,746	107,777	132,161	107,777	
	TOMATO PASTE	6,521	10,225	68,609	73,238	68,609	5,087	8,261	57,699	59,815	57,699	
	TOMATO SAUCE	5,723	5,571	61,680	68,893	61,680	5,599	5,314	58,252	57,694	58,252	
	OTHER CANNED VEG	17,695	19,061	193,293	229,781	193,293	20,912	21,921	246,111	278,154	246,111	
	Subtotal:-----	43,347	52,063	482,952	572,436	482,952	41,754	48,904	487,988	554,351	487,988	
FROZEN VEGETABLES MT												
	FROZEN FRENCH FRY	19,947	17,919	190,112	211,387	190,112	11,471	12,521	134,442	149,434	134,442	
	FZN SWT CORN	4,986	6,081	60,346	62,107	60,346	3,941	4,992	47,728	50,528	47,728	
	POTATOES, FZN	1,550	1,906	15,109	18,656	15,109	1,292	1,439	13,530	14,968	13,530	
	OTHER FZN VEG	4,895	5,577	66,734	60,509	66,734	4,966	5,254	64,044	57,313	64,044	
	Subtotal:-----	27,379	31,485	332,302	352,660	332,302	21,670	24,207	259,746	272,244	259,746	
DEHYD VEGETABLES MT												
	GARLIC DEHY	534	605	8,025	7,478	8,025	1,296	1,517	18,961	18,182	18,961	
	ONIONS DEHY	2,076	2,130	22,410	23,183	22,410	4,892	4,715	52,228	53,986	52,228	
	POTATO DEHYD	3,028	3,386	42,711	34,315	42,711	2,664	3,477	36,910	35,043	36,910	
	OTHER DEHY VEG	3,191	2,880	32,573	32,937	32,573	4,772	4,768	44,914	49,325	44,914	
	Subtotal:-----	8,331	9,002	105,721	97,915	105,721	13,626	14,479	153,014	156,537	153,014	
TREE NUTS MT												
	ALMOND SH/PRP	20,942	14,950	172,132	161,466	172,132	67,869	63,486	564,386	565,786	564,386	
	ALMONDS, UNSHLD	1,372	1,633	12,938	15,878	12,938	3,100	3,532	26,940	32,772	26,940	
	PISTACHIO, UNSHLD	858	393	9,969	12,840	9,969	2,964	1,345	33,122	42,591	33,122	
	WALNUTS, SHLD	2,310	3,972	21,123	16,909	21,123	6,343	4,394	65,550	58,735	65,550	
	WALNUTS, UNSHLD	6,759	2,882	56,545	31,152	56,545	14,065	6,209	100,661	67,492	100,661	
	OTHER NUTS	4,235	3,639	56,450	57,568	56,450	12,552	12,873	162,964	168,454	162,964	
	Subtotal:-----	36,478	24,471	329,159	297,816	329,159	106,894	91,841	953,626	935,834	953,626	
NURSERY PRODUCTS NONE												
	CUT FLOWERS	0	0	0	0	0	2,529	3,790	32,902	38,122	32,902	
	OTHER NURSERY	0	0	0	0	0	11,386	9,381	168,078	172,239	168,078	
	Subtotal:-----	0	0	0	0	0	13,916	13,172	200,980	210,362	200,980	
HOPS & PRODUCTS MT												
	HOP EXTRACT	89	211	4,594	4,027	4,594	1,031	2,715	59,263	66,837	59,263	
	HOP PELLETS	297	301	4,827	5,116	4,827	1,394	1,637	27,969	30,931	27,969	
	HOPS, NSFP	124	33	2,596	2,521	2,596	769	195	13,835	15,507	13,835	
	Subtotal:-----	511	546	12,018	11,665	12,018	3,195	4,548	101,068	113,275	101,068	
WINE KL												
	GRAPE WINES	9,943	10,577	117,129	117,688	117,129	14,739	14,954	159,405	165,337	159,405	
	OTHER WINE PRODUCTS	2,911	1,031	21,160	14,839	21,160	1,200	1,009	10,340	11,242	10,340	
	Subtotal:-----	12,854	11,608	138,290	132,527	138,290	15,940	15,963	169,745	176,580	169,745	
MISCELLANEOUS KL												
	BEER & BEVERAGES	26,310	35,352	366,786	414,388	366,786	16,792	22,007	227,657	259,492	227,657	
	EDIBLE PREPARATIONS	8,443	11,844	92,296	124,809	92,296	32,992	42,026	338,122	450,622	338,122	
	GINSENG	32	603	894	603	3,515	3,186	77,766	77,766	77,766	77,766	
	POTATO CHIPS	3,591	3,724	34,280	47,774	34,280	8,854	9,881	88,032	118,430	88,032	
	OTHER MISCELL	6,759	2,882	56,545	31,152	56,545	14,065	6,209	100,661	67,492	100,661	
	Subtotal:-----	26,310	35,352	366,786	414,388	366,786	57,043	608,713	6,922,257	7,298,750	6,922,257	
Grand Total:												

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
SEP 93

NAME		QUANTITY				VALUE (1,000 DOLLARS)							
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR LAST YR	TODATE CURR YR	YR LAST YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR LAST YR	TDT LAST YR	YR CURR YR	LAST YEAR
FRESH FRUIT	MT												
APPLES		4,042	4,423	133,940	119,770	133,940	1,714	1,829	81,176	70,726	81,176	70,726	81,176
AVOCADO		5,948	882	22,817	18,470	22,817	4,519	879	21,279	12,899	21,279	12,899	21,279
BANANA		274,945	297,087	3,432,626	3,536,585	3,432,626	81,980	82,601	1,008,482	1,004,787	1,008,482	1,004,787	1,008,482
CANTELOUPE		480	30	219,672	213,007	219,672	3	0	72,209	67,635	72,209	67,635	72,209
GRAPE		2,180	1,875	20,170	24,791	20,170	2,783	1,815	18,039	26,602	18,039	26,602	18,039
KIWI FRUIT		2,104	3,067	74,513	110,290	74,513	1,779	2,401	69,280	84,344	69,280	84,344	69,280
MANGO		467	98	24,848	47,376	24,848	335	72	34,627	26,410	34,627	26,410	34,627
PEACH		265	198	59,134	64,825	59,134	806	550	32,689	36,088	32,689	36,088	32,689
PEAR		8,044	9,327	121,734	124,177	121,734	3,164	3,433	43,232	46,139	43,232	46,139	43,232
PINEAPPLE		5	5	10,471	10,470	10,471	9	19	12,941	22,158	12,941	22,158	12,941
STRAWBERRY		66	45	111,461	114,510	111,461	27	19	39,090	41,350	39,090	41,350	39,090
OTHER MELON		31,979	29,303	483,856	512,714	483,856	11,565	10,992	195,677	205,691	195,677	205,691	195,677
OTHER FRUIT		330,538	346,615	5,055,389	5,220,125	5,055,389	108,844	104,203	1,884,232	1,892,412	1,884,232	1,892,412	1,884,232
Subtotal:----													
DRIED FRUIT	MT												
DRD APRICOT		781	693	7,670	11,053	7,670	1,847	1,707	16,435	25,135	16,435	25,135	16,435
DRD FIG & PASTE		341	707	2,221	7,406	2,221	9,123	12,520	10,808	16,620	10,808	16,620	10,808
OTHER DRD FRUIT		2,105	2,900	22,174	29,643	22,174	2,637	3,845	28,589	36,546	28,589	36,546	28,589
Subtotal:----		3,227	4,300	39,066	49,483	39,066	4,741	5,960	57,645	72,490	57,645	72,490	57,645
FROZEN FRUIT	MT												
FZN BLUEBERRIES		732	615	5,667	5,677	5,667	1,310	767	10,016	9,926	10,016	9,926	10,016
FZN STR		1,095	504	20,847	19,337	20,847	961	431	21,986	21,271	21,986	21,271	21,986
OTHER FZN FRUIT		2,067	1,959	27,999	27,651	27,999	2,732	2,137	39,033	39,073	39,033	39,073	39,033
Subtotal:----		4,105	3,072	54,514	52,651	54,514	4,734	3,335	64,075	65,236	64,075	65,236	64,075
CANNED/PREP FRUIT	MT												
CANNED OLIVES		6,704	6,122	76,771	74,492	76,771	12,369	10,030	155,803	153,316	155,803	153,316	155,803
CANNED ORANGES		3,377	2,636	62,098	61,806	62,098	3,853	2,293	74,127	39,502	74,127	39,502	74,127
CANNED PEACH		2,184	1,629	20,877	23,011	20,877	1,448	925	13,502	15,375	13,502	15,375	13,502
CANNED PINEAPPLE		21,865	25,529	335,888	344,866	335,888	14,380	14,832	224,262	212,896	224,262	212,896	224,262
MIXED FRUIT		1,037	1,923	34,204	33,405	34,204	1,008	1,674	30,745	29,875	30,745	29,875	30,745
PREP/PRES FRUIT		4,606	5,034	57,779	58,233	57,779	5,602	5,828	66,548	66,860	66,548	66,860	66,548
OTHER CANNED FRUIT		43,140	47,228	631,786	623,093	631,786	42,456	40,238	622,229	578,600	622,229	578,600	622,229
Subtotal:----													
FRITAVEG JUICE (SSE)	KL												
APPLEPEAR JU		53,263	80,190	880,377	946,807	880,377	18,350	16,895	332,584	243,682	332,584	243,682	332,584
FCOJ		96,407	148,055	1,072,459	1,122,350	1,072,459	19,537	30,386	306,090	191,591	306,090	191,591	306,090
GRAPE JU		25,919	11,982	168,934	148,404	168,934	9,821	3,512	61,942	52,117	61,942	52,117	61,942
PINAP		20,888	18,159	339,911	329,911	339,911	2,023	1,544	74,939	72,991	74,939	72,991	74,939
OTHER FRUIT JU		7,345	10,860	135,538	149,384	135,538	4,796	8,086	81,072	77,630	81,072	77,630	81,072
Subtotal:----		203,824	269,239	2,608,604	2,706,217	2,608,604	57,660	62,906	874,681	642,789	874,681	642,789	874,681
FRESH VEGETABLES	MT												
GARLIC		834	5,545	18,753	29,171	18,753	657	2,521	18,679	23,144	18,679	23,144	18,679
ASPARAGUS		931	1,617	25,401	29,852	25,401	899	1,631	33,057	39,213	33,057	39,213	33,057
BELL PEPPER		2,783	3,943	80,919	121,859	80,919	4,687	6,654	89,726	129,247	89,726	129,247	89,726
CARROTS		6,974	7,105	65,290	51,431	65,290	1,794	1,782	18,215	14,066	18,215	14,066	18,215
CHILI PEPPER		4,468	2,759	36,165	36,933	36,165	2,778	1,414	50,620	48,709	50,620	48,709	50,620
CUCUMBER		2,049	1,145	47,881	38,841	47,881	1,050	581	69,892	65,192	69,892	65,192	69,892
ONIONS		4,651	9,449	191,641	218,400	191,641	3,234	4,501	110,368	104,818	110,368	104,818	110,368
POTATO, INCL SD		9,362	14,880	153,754	302,186	153,754	1,437	2,780	24,398	49,596	24,398	49,596	24,398
SQUASH		1,031	1,294	83,525	95,290	83,525	412	690	45,003	87,590	45,003	87,590	45,003
TOMATOES		11,599	15,674	214,841	380,911	214,841	6,128	10,616	14,179	30,597	14,179	30,597	14,179
OTHER FRESH VEGETAB		19,888	19,743	267,390	285,285	267,390	9,612	8,885	146,556	156,351	146,556	156,351	146,556
Subtotal:----		64,574	83,160	1,315,566	1,790,165	1,315,566	32,868	41,219	749,697	1,045,351	749,697	1,045,351	749,697
CANNED/DEHYD VEGET	MT												
CND ARTICHOKE		1,942	1,566	18,922	20,456	18,922	3,299	2,476	30,366	32,256	30,366	32,256	30,366
CANNED BAMBOO		3,147	3,046	29,096	28,985	29,096	2,009	1,985	24,935	24,935	24,935	24,935	24,935
CND MSHROOMS		2,477	3,303	50,617	47,213	50,617	8,025	7,184	117,506	100,977	117,506	100,977	117,506
CND PIMIENTO		690	447	7,503	6,172	7,503	1,157	500	8,532	13,001	8,532	13,001	8,532
CND TOM		4,550	4,077	40,822	45,500	40,822	1,645	1,541	17,065	17,799	17,065	17,799	17,065
CND WATERCHESNU		2,165	2,934	34,835	39,588	34,835	3,315	2,466	26,777	29,776	26,777	29,776	26,777
TOMATO PASTE & SAUC		2,042	1,236	24,162	40,209	24,162	1,176	788	15,489	27,282	15,489	27,282	15,489
DRIED MUSHROOMS		59	76	1,371	1,817	1,371	776	998	10,797	22,462	10,797	22,462	10,797
DRIED TOMATOES		7,180	9,020	79,779	89,437	79,779	7,261	9,572	74,390	84,901	74,390	84,901	74,390
OTHER DRIED VEGETAB		16,821	17,658	180,464	197,571	180,464	17,190	18,328	192,648	208,971	192,648	208,971	192,648
Subtotal:----		42,712	44,056	474,834	523,108	474,834	45,973	43,650	552,850	558,172	552,850	558,172	552,850
FROZEN VEGETABLES	MT												
BROCCOLI FZN		14,256	9,442	156,737	170,431	156,737	9,931	6,031	108,309	113,224	108,309	113,224	108,309
Cauliflower FZN		5,941	9,647	85,276	125,895	85,276	3,494	5,449	45,302	69,284	45,302	69,284	45,302
POTATO FZN		58,135	142,355	1,063,606	1,671,650	1,063,606	7,123	6,237	89,337	88,516	89,337	88,516	89,337
OTHER VEG FZN		79,897	163,202	1,324,716	1,990,268	1,324,716	21,645	18,975	258,340	286,696	258,340	286,696	258,340
Subtotal:----													
TREE NUTS	MT												
BRAZILS TOT		872	497	9,958	10,429	9,958	1,337	949	13,892	15,171	13,892	15,171	13,892
CASHEWS TOT		5,336	6,187	56,063	64,377	56,063	24,611	24,963	253,429	260,328	253,429	260,328	253,429
COCONUT		1,143	701	14,438	20,305	14,438	3,066	3,053	46,131	88,874	46,131	88,874	46,131
PECANS		1,137	1,805	13,198	15,023	13,198	5,103	5,340	74,202	84,914	74,202	84,914	74,202
OTHER NUTS		14,245	15,448	154,423	175,987	154,423	39,217	41,204	419,756	486,914	419,756	486,914	419,756
Subtotal:----													
NURSERY PRODUCTS	M												
CARNATIONS		64,079	61,515	889,889	920,969	889,889	5,972	5,972	83,596	82,772	83,596	82,772	83,596
CHRISTMAS TREES		11,890	15,242	215,648	159,073	215,648	4,788	4,169	61,226	65,054	61,226	65,054	61,226
CHRYSANTHEMUMS		32,143	40,315	604,446	528,658	604,446	88,276	62,448	109,237	109,237	109,237	109,237	109,237
ROSES		96,498	95,738	281,547	284,022	281,547	11,499	11,522	31,528	32,959	31,528	32,959	31,528
TULIP BULBS		0	0	0	0	0	0	0	0	0	0	0	0
OTHER CUT FLRS		0	0	0	0	0	0	0	0	0	0	0	0
OTH NURS PROD		207,611	212,812	1,893,726	1,950,730	1,893,726	59,778	61,600	573,609	623,959	573,609	623,959	573,609
Subtotal:----													
HOPS & PRODUCTS	MT												
HOPS & PELLETS		0	0</										

Export News and Opportunities

Brazil's orange juice export forecast for marketing year 1993/94 is reduced, based on a smaller stock carry-in.

Brazil's orange juice exports in marketing year 1993/94 (July-June) are forecast at 1.02 million metric tons, 65 degrees brix, 50,000 tons below the previous forecast as supplies were lower due to a smaller stock carry-in than earlier estimated. Brazil's orange juice production forecast for 1993/94 is unchanged from last reported.

Brazil's orange juice production estimate for 1992/93 was revised upward slightly, due to larger production from the northeast. Orange juice exports in 1992/93 were increased more sharply, due to larger shipments from both Sao Paulo and the northeast. Ending stocks for 1992/93 were reduced because of the higher exports.

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/

	1991	1992	1993
Oranges, Sao Paulo Million Boxes 2/			
Production 3/	250	314	282
Fresh Consumption	35	38	38
Fresh Exports	3	2	2
Processed	212	274	242
FCOJ, Brazil- 1,000 Metric Tons, 65 Degrees Brix 4/			
Beginning Stocks	126	68	105
Production			
Sao Paulo	920	1,100	1,000
Other	29	45	20
Total	949	1,145	1,020
Exports 5/			
Sao Paulo	960	1,045	1,000
Other	29	45	20
Total	989	1,090	1,020
Consumption	18	18	18
Ending Stocks	68	105	87
FCOJ Yields	4.29	4.00	4.11

1/Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated. 2/40.8 kg. or 90 pounds

3/Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines and tangors used for processing. 4/One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix or 1,405.88 gallon at single strength equivalent.

5/Includes tangerine juice.

Indonesia, Turkey and Venezuela receive GSM-102 allocations for fiscal year 1994.

In the past month the USDA announced GSM-102 credit guarantee programs for horticultural products with three markets: Indonesia, Turkey, and Venezuela. The table below shows that additional coverage for fresh fruit and frozen french fries totaling \$9 million was established for these markets. Thus far in fiscal year 1994, a total of \$15 million has been allocated for horticultural products and commodities under the GSM-102 program. U.S. exporters have yet to register program sales in the current fiscal year.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 (\$1,000)	Exporter Applications Approved (\$1,000)	Balance
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	1,000	0	1,000
Hops	2,000	0	2,000
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Turkey			
Potatoes 3/	5,000	0	5,000
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through 11/12/93.

2/ Apples, pears, plums, peaches, nectarines, and strawberries.

3/ Cut for french fries.

4/ Apples, pears, plums, grapes, cherries, and peaches.

World Trade Situation and Policy Updates

World Trade Situation and Policy **Updates**

Canada amends its onerous packaging requirements for processed products.

On November 3, the Government of Canada revised its packaging requirements for processed products, giving American exporters somewhat better access to the food service trade. Now containers up to 20 kilograms (44 pounds) can be used, where before U.S. firms could not use packages larger than 2 kilograms (about 4.4 pounds).

Shown below are the basics of the new requirements:

1. Containers may not hold more than 20 kilograms, or 20 kiloliters.
2. Net quantity must be labeled, and must be in a multiple of 500 grams or 500 milliliters.
3. Inner containers of multi-container packages must comply with Canadian retail package labeling requirements, including bilingual (English and French) labels.
4. U.S. companies must obtain written preclearance from Agriculture Canada, stating that the labels meet Canadian requirements.
5. Importers must provide evidence that the product was subject to inspection equivalent to what is in place in Canada.

For further information about the new regulations, contact:

Peter Bouris
Labeling Section, Agriculture Canada
2255 Carling Avenue
Ottawa, Ontario K1A 0Y9
Ph. 613-995-5433

However, there are still some problems with the new regulations. They have created burdensome labeling requirements (inner containers of multi-packages must meet all retail labeling standards), package size restrictions (must be a multiple of

500 grams), and discriminatory treatment for importers (Canadian firms have a 2 year exemption from the new requirements while importers do not, and importers must have written preclearance from Agriculture Canada while Canadian firms do not need pre-clearance).

Technical talks with Taiwan yielded prospects for progress on codling moth and potato issues.

In recent Agricultural Working Group consultations, Taiwan plant quarantine authorities agreed to accept an alternative approach to permit U.S. apple shippers to meet new codling moth guidelines scheduled for 1994 implementation. In addition, the authorities agreed to proceed with evaluating quarantine data which could lead to the opening of the Taiwan market to U.S. potatoes. To resolve a year-long impasse with the U.S. on the codling moth proposal, Taiwan authorities agreed to accept existing U.S. systems as providing equivalent quarantine security of codling moth in U.S. apples. U.S. pears and stone fruit are expected to be subject to a separate, but similar, codling moth guideline to be implemented with the 1995 crops and it is believed that they will also be granted the same "equivalent control" provision. On potatoes, Taiwan agreed to consider seedstock imports from Alaska, providing that it can be demonstrated that certain nematodes of quarantine concern do not exist in that state. On table potatoes, Taiwan agreed to proceed with its review of phytosanitary data from the U.S. demonstrating that export shipments can be made that are free of certain nematodes.

Malaysia reduced import duties on a number of horticultural products.

For the second consecutive year, the Malaysian government has reduced the import duties on a variety of fresh fruits and nuts; with most duties reduced from 20 to 10 percent ad valorem. The 15 percent duty on fresh cherries, which was not reduced last year, was lowered to 10 percent as well.

These duty reductions should help make U.S. products more affordable to Malaysian consumers, who continue to demand more U.S. horticultural products. In 1992, Malaysia imported nearly \$16 million in fresh fruit and \$3.5 million in tree nuts from the United States--registering increases of 35 and 114 percent, respectively, from 1991. As an example of how the revised import duties will affect prices of U.S. products, the retail cost of a carton of apples should be lower by \$1.20 to \$1.40, depending on the c.i.f. value. The Malaysian government will monitor retail prices to ensure that the lower costs are passed on to consumers.

Fruits and nuts with tariff rates lowered from 20 percent to 10 percent included: Brazil nuts, cashew nuts, figs, avocados, fresh mandarins, grapefruit, fresh grapes, raisins, fresh apples, fresh pears, fresh apricots, fresh peaches, fresh plums, fresh berries, currants, cranberries, provisionally prepared cherries and strawberries, nut mixtures, and fruit and nut mixtures.

The North America Free Trade Agreement (NAFTA) is on track for the January 1, 1994, implementation date.

On November 17, 1993, the U.S. House of Representatives approved NAFTA. This was followed in quick succession by approval in the U.S. Senate and the Mexican Senate. The agreement will eliminate most trade barriers among the three partners, either immediately or over a 15-year transition period. A number of provisions designed to protect horticultural and tropical product interests were added to NAFTA prior to the vote in the U.S. House of Representatives. Combined U.S. horticultural exports to our NAFTA partners exceeded \$2.542 billion in 1992; trade flows are expected to

continue to increase as a result of the agreement. The following is a list of safeguards contained in the implementing legislation.

1) **Frozen Concentrated Orange Juice (FCOJ)** Duty snapback based on both price and quantity. The United States may temporarily raise duties on Mexican FCOJ under certain conditions during the 15-year tariff phase-out period. In such cases, the United States could apply a tariff on Mexican FCOJ equal to the current duty on FCOJ (9.25 cents/gal,SSE) or the duty charged on FCOJ from most other countries, whichever is lower. From now until 2002, the safeguard applies when Mexican imports exceed 70 million gallons, SSE. From 2003 through 2007, the snapback is applied when imports of Mexican FCOJ exceed 90 million gallons. Price conditions are based on 5-year monthly average closing prices on the NYCE for FCOJ. Both price and quantity conditions must be met to trigger the higher duty. The temporary duty ceases if the futures price is above the historical price for five consecutive days.

2) **Winter Vegetables:** International Trade Commission (ITC) monitoring. This provision would protect against price-based import surges from Mexico by providing for monitoring of fresh tomatoes and bell peppers. Under this scheme, the ITC could request assistance from USDA/FAS in monitoring commodity prices. This expedited investigation would allow for reimposition of duties for provisional relief.

3) **Wine:** Tariff acceleration. This provision Proposes to open negotiations to eliminate Mexico's tariff schedule for wine more quickly than the 10 years currently specified under NAFTA. The first round of tariff acceleration talks among the three partners could take place shortly after NAFTA goes into effect. These discussions target commodities for which a prompt reduction in tariffs would be mutually beneficial.

CANNED DECIDUOUS FRUIT OUTLOOK

Marketing opportunities for deciduous canned fruit in 1993/94 will continue to be a challenge for the United States and other exporters. U.S. exports of aggregate canned deciduous fruit have risen steadily over the past 4 years, reaching 58,616 metric tons in 1992/93 (June/May). Although world production is forecast lower in 1993/94, burdensome carryover stocks and stagnant demand will likely dampen export prospects for many shippers. Continued recession in the major export markets of the European Community and Japan suggests only limited improvement in demand. These factors will further aggravate the imbalance in the supply situation and heighten competition among exporters.

CANNED PEACHES

The canned peach situation has been characterized by expanding production and contracting exports. Total canned peach output in selected countries during 1992/93 has been revised upward slightly to 810,000 tons, about 12 percent above the previous season (see Horticultural Products Review, May 1993). Declines in Greece and Spain are more than offset by gains in Italy, South Africa, and Chile. The added availabilities further burdened an already competitive situation in the world market. Total 1992/93 exports from selected suppliers are estimated at 427,200 tons, almost eight percent below the previous year. Sluggish demand for canned product in many markets combined with higher output contributed to record carry-out stocks in the selected group of countries in 1992/93.

The combination of sustained high fresh fruit outturn and stagnating demand for canned product has led the EC to impose regulations designed to curb production. Among the measures enacted for the current marketing year are reductions in minimum producer prices, withdrawal prices, and the processing aid. Producer prices were reduced about 14 percent to 22.962 ECU/100 kilograms; the processing aid for 1993 was lowered over 22 percent to 6.777 ECU/100 kilograms, basis net weight fruit plus syrup/juice. Based on EC Regulation No. 1202/92, a ceiling of 283,000 tons of peaches delivered to withdrawal pools for the entire EC was established for 1993. Prospects for the 1993/94 export campaign are further dampened by record carryover stocks, estimated at 171,000 tons, or about 2.5 times above the previous season's level.

EUROPEAN COMMUNITY

The EC dominates all phases of the global canned peach industry. Collectively, the EC is both the world's largest producer and consumer of canned peaches, and holds a commanding position in many export markets. Table 1 presents trade data for canned peaches and shows that despite substantial intratrade, the EC has had a large exportable surplus.

Table 1. EC Canned Peach Trade, 1988-1992
(Metric Tons)

	1988	1989	1990	1991	1992
IMPORTS					
Intratrade	134,725	133,688	192,835	228,568	224,548
Others 1/	16,620	17,852	24,607	31,020	25,196
EXPORTS					
Intratrade	135,764	175,087	238,546	256,087	252,946
Others 2/	68,215	101,963	86,858	84,211	118,814

Source: Eurostat data

1/Includes South Africa, Australia, United States, and Argentina.

2/Includes Japan, Canada, Mexico, United States, and Poland.

GREECE

Greece is the EC's major producer of canned peaches, accounting for almost 60 percent of total volume in 1992/93 (June/May). Production last year is estimated at a record 364,000 tons, due to a bumper peach crop and a high pack-to-fruit ratio. For the current year, production is forecast lower based on burgeoning stocks and anticipated stagnant demand. This situation has further depressed product offer prices for the new pack, and has reportedly led to a very low level of advance sales and commitments. By mid-August last year about 50 percent of the canned product was committed. Offer prices in mid-September were 30 to 35 percent below prices of a year ago. Because of these factors, the 1993 peach pack is forecast at 320,000 tons, a decline from last season's record.

After solid growth in export volume over the past 5 years, Greek canned peach shipments fell to an estimated 280,000 tons in 1992/93. However, Greek exports are expected to rebound in 1993/94 as lower product prices are expected to improve prospects for export sales. Table 2 shows that Greece is very active in many U.S. canned peach export markets. There has been substantial recent growth in trade with countries that were not established markets, such as Mexico. Growth in some Latin American markets in 1992 was facilitated by a sharply lower Argentine pack and reduced exportable supplies.

Although Greece is a competitor, one of its largest export markets is the United States. In recent years there has been an increase in U.S. imports of Greek product in catering packs. A review of aggregate export values for U.S. and Greek canned fruit indicates the U.S. product is at a premium. High-value U.S. canned peaches are noted for consistently superior quality. U.S. values averaged about \$0.95/kilogram (f.o.b.) over the past four seasons, compared with \$0.70/kilogram (f.o.b.) for Greek product during the same period. In previous seasons the quality of Greek canned product has been an issue, and this possibly accounts for the lower unit values on exports. However, aggregate values have been rising, from \$0.59/kilogram (f.o.b.) in 1989 to \$0.76/kilogram (f.o.b.) in 1993, an indication that quality has generally been improving. This marketing year quality is expected to be good, as the incidence of pit fragments is reportedly under control.

Table 2. Greece Exports of Canned Peaches, 1988-1992
(Metric Tons)

MARKET	1988	1989	1990	1991	1992
Mexico	0	231	3,639	4,033	17,961
Canada	4,865	12,811	11,676	10,989	16,675
U.S.	22,897	26,507	14,817	10,412	11,431
Argentina	0	0	771	1,805	4,296
Brazil	0	0	532	2,570	2,873
Chile	0	0	461	229	593
Japan	8,852	15,851	10,300	14,064	16,123
Poland	966	739	3,085	4,602	6,468
Austria	2,368	4,624	3,960	5,505	7,093
Finland	1,423	3,171	4,682	3,553	6,488
Sweden	1,934	2,315	3,821	3,831	3,660
Germany1/	45,273	63,270	92,84	103,319	98,746
U.K.	22,778	24,692	34,083	28,226	31,471
Total EC	94,717	131,443	183,880	197,526	197,164
Others	50,140	85,476	73,317	69,261	106,518
TOTAL	144,857	216,919	257,197	266,787	303,682

Source: Eurostat data

1/Exports before 1991 are to West Germany.

The Greek canned deciduous fruit industry continues to be plagued by the government's tight money policy which has driven interest rates to about 26-27 percent. Financial woes combined with falling prices and a leveling off of demand from EC member states have dimmed prospects for some of Greece's 36 canners. The growth in exports (see Table 2) has not always been accompanied by increased profits. According to industry reports, some unprofitable sales contracts have been executed in an effort to contain burdensome stocks, now estimated at a record 81,000 tons in 1992/93. Even with a lower pack and slightly improved prospects for exports in 1993/94, Greece will face another record carryout of canned peach stocks. These factors will likely further pressure Greek canners in the coming season.

SPAIN

Spanish canned peach production for 1992/93 is lowered slightly to 127,000 tons based on the revised 1992 pack estimate. A preliminary

assessment of the 1993 pack suggests a production level of about 88,000 tons for 1993/94. The lower outturn for the current year reflects a smaller peach crop and lower deliveries to canners. According to industry sources, many of Spain's canners are financially strapped and are facing continued high interest rates. This situation has contributed to some contraction of the industry.

Spain is primarily a fresh fruit market, although domestic consumption of canned peaches has been rising over the past five years and is forecast at 95,000 tons in 1993/94.

Spain ranks third among EC states behind Greece and Italy in terms of canned peach exports. Like Greece, Spain relies on EC member states as outlets for its surplus production (see Table 3). It should be noted that the Canary Islands are an administrative possession of Spain, and a major export market. The most important non-EC market for Spain is the United States, where exports climbed to 1,086 tons in calendar 1992.

**Table 3. Spain Exports of Canned Peaches, 1988-1992
(Metric Tons)**

MARKET	1988	1989	1990	1991	1992
Mexico	0	275	561	51	117
Canada	563	822	266	79	194
U.S.	3,548	2,323	788	41	1,086
Canary Is.	3,040	3,819	3,566	3,289	3,876
Switzerland	884	569	244	78	259
Germany ^{1/}	1,065	1,039	1,782	1,244	1,463
U.K.	2,078	5,122	2,664	874	2,201
Total EC	5,906	9,548	7,507	3,755	6,966
Others	12,143	10,167	7,764	4,215	6,513
TOTAL	18,049	19,715	15,271	7,970	13,479

Source: Eurostat data

^{1/}Exports before 1991 are from West Germany.

ITALY

Canned peach production for 1992/93 is revised upward to 98,000 tons, 21 percent above the previous season. This adjustment is based on a higher Italian pack than previously estimated. Due to a weather-affected, lower 1993 peach crop, the pack is forecast to fall to the levels of a few years ago. Lower availabilities will help keep stocks at a more manageable level in this period of expected sluggish EC demand and flat domestic consumption. In Italy, as in Spain, the preference is reportedly for fresh fruit. Further complicating matters for the Italian canned fruit industry are high costs of production.

Of the three EC producers highlighted in this article, Italy relies to a greater extent on EC members as a conduit for its canned deciduous fruit. Table 4 shows the extent to which Italy depends upon EC intratrade. Over the past five years almost 90 percent of Italy's total trade has been with other EC countries. Non-EC Western European countries such as Austria and Sweden have been steady markets, whereas Saudi Arabia and the United States have presented somewhat erratic export opportunities. For the current marketing year, Italy's exports of canned

peaches are forecast at 44,000 tons, a 10 percent increase over the previous year.

**Table 4. Italy Exports of Canned Peaches, 1988-1992
(Metric Tons)**

MARKET	1988	1989	1990	1991	1992
U.S.	745	1,479	0	0	40
Saudi Arab	1,704	896	1,332	1,985	431
Austria	395	473	854	980	1,014
Switzerland	256	232	137	189	246
Sweden	182	188	523	460	160
Germany ^{1/}	14,790	12,146	23,281	24,764	23,112
U.K.	5,843	7,102	6,399	7,168	7,557
Total EC	27,03	25,825	38,823	44,586	39,214
Others	3,968	3,645	3,437	5,170	3,263
TOTAL/	31,001	29,470	42,260	49,756	42,477

Source: Eurostat data

^{1/}Exports before 1991 are from West Germany.

SOUTH AFRICA

South Africa is an export-oriented producer of canned fruit, with about 90 percent destined for foreign markets. Production of canned peaches for 1992/93 is revised upward based on information released by the local industry. The peach pack for 1992/93 is now estimated at a record 74,619 tons, an increase of slightly over nine percent over a year earlier. This boost in production coincided with stagnating demand from South Africa's export markets following large crops in the EC. Some export contracts were cancelled as buyers reportedly sought cheaper product from EC suppliers.

The pace of exports for 1992/93 (Nov/Oct) has lagged behind the previous year. From January through July 1993, only 35 percent of export sales had been shipped. During the same period in the previous year, slightly over half of export contracts had been executed. Because of the sluggish shipment pace, exports are revised downward to 52,500 tons, a moderate increase from last year but still well below the level reached in 1990/91. The slow pace of shipments has meant a cash flow problem for canners, a situation that has encouraged

producers to delay price increases in order to stimulate sales. Table 5 shows the importance of the EC and Japan to South Africa's canned peach trade. These two markets have accounted for an average of about 75 percent of South Africa's exports. Due to lackluster export prospects, ending stocks in 1992/93 are estimated to grow by a third to about 40,300 tons.

Table 5. South Africa Canned Peach Trade, 1989-1992
(Selected Markets; Metric Tons)

MARKET	1989	1990	1991	1992
IMPORTS				
Germany 1/	7,499	11,395	12,723	8,711
U.K.	9,186	0	9,501	6,458
French	1,015	1,114	1,368	687
Total EC	20,383	17,063	29,041	20,882
Japan 2/	12,595	10,215	12,010	12,400
EXPORTS 3/	48,000	54,400	56,700	50,800

Source: Eurostat data 1/ Imports before 1991 are for West Germany.

2/ Import data are converted "24/2 1/2" data from Japan's MOF; 1992, estimated.

3/ Data are estimated volume shipped by South Africa during the calendar year and may not correspond exactly with official RSA data.

AUSTRALIA

The estimate of Australia's canned peach production for 1993 remains unchanged at 35,000 tons, about nine percent above the preceding year. Domestic consumption of canned peaches (and other fruit) is stagnant, due in large part to a variety of factors ranging from improved year-round availability of fresh fruit to a reduction in shelf space allocated for canned fruit in retail outlets. A larger pack and flat local demand have increased export availabilities in 1993. A weaker Australian currency is expected to help lift canned peach exports despite continued stiff competition, especially from subsidizing suppliers in the EC. Exports in 1993 are pegged at 17,000 tons, a recovery from last year's historically very low level, but well below the record 28,000 tons shipped in 1988. The Australian canned fruit industry remains concerned about the impact of the North American Free Trade Agreement (NAFTA) on Canada, its major export market. Shipments to Canada accounted for about 38 percent of Australia's exports of canned peaches in 1992.

CHILE

Excellent weather during the growing and harvesting season contributed to a slight increase in peach output for canning purposes and a higher pack for 1993, estimated at 30,000 tons. Total Chilean canned peach production is still expected to be smaller than last year due to competition from large amounts of fresh peach exports to Argentina. Argentine canners purchased large volumes of Chilean fresh peaches to compensate for a smaller hail-damaged local crop. Despite large supplies of canned peaches over-hanging the international market, Chile's exports in 1993 are revised upward to 20,500 tons, based on the pace of shipments during the first 6 months of this year.

CANNED PEARS

The canned pear situation in 1992/93 is characterized by dramatically higher output, higher exports, and a doubling of stocks. Total canned pear production in the six selected countries in 1992/93 has been revised upward to about 190,000 tons, an increase of about 20 percent above the previous estimate. Substantial increases in estimates of the pear pack in Italy and South Africa account for this

revision. Aside from a slight decline in Spain, production in all other reporting countries is unchanged. As with canned peaches, increased supplies of canned pears further tighten an already competitive world situation. Total exports by selected suppliers is expected to reach about 98,600 tons, almost two percent below earlier projections. Sluggish demand combined with higher output has contributed to record ending stocks in the selected group of countries in 1992/93.

EUROPEAN COMMUNITY

The EC enjoys a dominant position in many phases of the global pear industry. Collectively, the EC is both the world's largest producer and consumer of canned pears. Only Australia exports more canned fruit than the EC, which is led by Italian shipments primarily to other EC markets. Table 6 shows that the EC is a net importer of canned pears, with Germany the largest market. Competitive market conditions throughout 1992/93, combined with stagnant domestic consumption and record output, led to a four fold increase in ending stocks, estimated at 39,550 tons.

ITALY

Italy's subsidized canned pear industry is export driven. Production for 1992/93 has been revised upward to 76,000 tons based on reports of a substantially larger pack than previously estimated. Higher export availabilities weighed on prices and helped raise exports slightly to about 33,400 tons. However, stocks rocketed skyward and ended the marketing year at levels above the volume of exports. Some relief is in sight for the beleaguered industry, as a weather-affected 1993 pear crop is forecast to curb canned output at about 35,000 tons for 1993/94. This will improve the supply situation and should help pare burdensome stocks.

Italy is the EC's leading exporter of canned pears. Table 7 shows the virtual dependence of Italy's exports on neighboring EC markets.

Table 6. EC Canned Pear Trade, 1988-1992
(Metric Tons)

MARKET	1988	1989	1990	1991	1992
IMPORTS					
Intratrade	53,005	51,252	51,394	59,464	50,437
Others 1/	31,109	42,481	39,773	46,687	45,205
EXPORTS					
Intratrade	45,669	44,370	44,935	50,009	41,187
Others 2/	4,952	5,233	4,949	3,881	4,006

Source: Eurostat data 1/ Includes South Africa, Australia, Argentina, and China; after modest imports over the previous four years, in 1992 the EC imported 2,169 tons of U.S. product. 2/ Includes Austria, Switzerland, and the Canary Islands.

Table 7. Italy Exports of Canned Pears, 1988-1992 1/ (Metric Tons)

MARKET	1988	1989	1990	1991	1992
Austria	545	432	609	582	886
Switzerland	461	424	295	207	351
Sweden	831	562	682	645	270
Germany 2/14,250	13,649	16,291	15,057	15,445	
France	8,371	7,367	8,486	12,329	9,467
U.K.	9,621	9,456	8,036	7,280	8,752
Total EC	38,193	34,827	39,542	40,802	38,374
Others	2,335	1,758	1,936	1,595	2,186
TOTAL	40,528	36,585	41,478	42,397	40,560

Source: Eurostat data

1/Exports to selected markets only.

2/Exports before 1991 are to West Germany.

SPAIN

Spanish canned pear production for 1992/93 is lowered slightly to 13,000 tons, based on revised estimates of the 1992 pack. A preliminary assessment of the 1993 pack sets production at about 9,000 tons for 1993/94. The lower output for the current year reflects a smaller pear crop and lower deliveries to canneries. EC Regulation 1812/93 specifies a minimum producer price in 1993/94 for Williams and Rocha pears (for canning in syrup and/or natural fruit juice) of 32.512 ECU/100 kg; the production aid is set at ECU 16.507.

Table 8 shows that almost all of Spain's canned pear exports either stay within the EC or go to the Canary Islands, a Spanish administrative possession. Spain ranks a distant second after Italy in terms of canned pear exports.

Table 8. Spain's Exports of Canned Pears, 1988-1992 (Metric Tons)

MARKET	1988	1989	1990	1991	1992
Germany	1,540	609	1,086	1,168	1,007
U.K.	857	1,007	1,753	825	1,364
France	305	478	918	1,845	1,572
Italy	35	21	138	1,740	496
Total EC	3,120	2,417	4,514	6,133	4,972
Canary Is	1,327	1,638	1,661	1,121	678
Others	811	994	899	612	859
TOTAL	5,258	5,049	7,074	7,866	6,509

Source: Eurostat data

1/ Exports before 1991 are to West Germany.

AUSTRALIA

There is little change in the Australian canned pear situation from the last report. There is a small downward adjustment in the pear pack for 1992, combined with lower official export numbers and higher ending stocks. Production and trade for 1993 remain unchanged from previous forecasts. The Australian canned pear industry is focused on exports, as domestic consumption accounts for only about 10 percent of total supply. Stagnant local demand stems in part from improved availability of fresh fruit.

Australia is a major supplier of canned pears to the EC, which accounted for about 56 percent of total Australian exports in 1992. The EC canned pear trade with Australia has expanded rapidly over the past five years, rising from 8,513 tons in 1988 to 21,328 tons in 1992. Despite increased competition in world markets, Australia's canned pear exports are expected to rise in 1993 due in part to attractive prices resulting from a devaluation of the Australian currency. Exports are now projected to reach about 41,000 tons.

SOUTH AFRICA

South Africa is also an export-oriented producer of canned pears, diverting an average of about 12-13 percent of total supply for domestic consumption. Production for 1992/93 is revised upward based on a much larger pear pack than

previously estimated. Canned pear production for the current year is now estimated at 28,635 tons, a 38 percent increase over the preceding season. This considerable jump in production coincides with already stagnating demand from South Africa's major markets (EC), as well as large crops and higher canned pear outturn in Europe. Table 9 shows that demand from the major EC markets has been rather sluggish over the past five years. Total exports in 1993 are projected at 17,700 tons, marginally above last year.

**Table 9. EC Imports of South African Canned Pears 1/
(1988-1992; Metric Tons)**

MARKET	1988	1989	1990	1991	1992
Germany	6,133	7,510	7,442	7,622	3,765
U.K.	7,517	7,546	0 2/	6,924	4,823
France	1,411	3,072	2,419	1,505	1,470
Others	2,067	2,756	2,402	3,194	2,135
Total EC	17,128	20,884	12,263	19,245	12,193

Source: Eurostat data

1/ Imports by Germany before 1991 are by West Germany.

2/ U.K. imports in 1990 show 5,579 tons of canned pears from Namibia, which probably originated in South Africa.

CANNED FRUIT MIXTURES

The canned fruit mixtures situation is little changed from our last report. Output of canned fruit mixtures in selected markets for 1992/93 is revised upward slightly to 217,000 tons. Larger Italian and South African crops and higher deliveries to canneries accounts for most of the increase. Trade in canned fruit mixtures among the selected suppliers contracted slightly in 1992/93 due to stagnating demand from importers. Exports are now estimated at 148,400 tons, marginally below the previous year. Stocks continue to build, reaching an estimated 39,800 tons at the end of 1992/93.

CANNED APRICOTS

Total canned apricot production for 1992/93 in the four selected markets is adjusted downward to about 95,000 tons. A decline in apricot deliveries to canners in Spain more than offset production gains in South Africa. Exports are revised downward to 69,000 tons based on reports of general stagnant demand. Prospects for 1993/94 are unclear, although a forecast of a sharply lower Greek pack could help reduce inventories which burdened the market last year.

SPAIN

The estimate for canned apricot production for 1992/93 is reduced to 17,500 tons based on revised pack data for 1992. A larger forecast 1993 apricot crop may lead to a larger pack for 1993/94. Canned apricot production is provisionally set at 26,000 tons. The EC support scheme for canned deciduous fruit does not include apricots. The bulk of Spain's canned apricots are destined for neighboring EC markets. Over the past five years about 87 percent of canned apricots were shipped to EC markets.

GREECE

Canned apricot production for 1992/93 remains unchanged at almost 45,800 tons. The situation for 1993/94 is much different, as only about 15,000 tons of apricots were reportedly delivered to canneries in 1993. This is 60 percent below the 1992 level, and is due to a general lack of interest from processors. This is in large part attributable to burdensome canned stocks, depressed product prices, and limited interest from export markets.

The quality of this year's deliveries to canners is reportedly mixed because of above normal precipitation during May, which lowered the brix of the fruit. The sharka virus, which continues to spread, could possibly affect the volume of fruit produced in the next few years. A high volume of fruit was delivered to withdrawal pools this year, primarily because of the lack of interest from canners and to the trade embargo on Serbia and Montenegro.

Stagnant demand from major markets contributed to lower 1992/93 exports of about 30,000 tons. This general weak market tone will likely continue. Greek exports are forecast at 20,000 tons, almost all destined for EC countries.

Outlook for U.S. Exports of Canned Fruit

United States canned fruit exporters faced keen competition during 1992/93, primarily from the EC. Table 10 indicates that despite tough competition in world markets, total U.S. exports expanded in 1992/93. Gains were made in

canned fruit mixtures, while canned peach shipments were flat and canned pears declined after building steadily for the previous four seasons.

**Table 10. Aggregate U.S. Canned Fruit Exports 1/
(MY1988/89-MY1992/93; Metric Tons)**

	1988/89	1989/90	1990/91	1991/92	1992/93
Mixtures	22,973	19,097	28,074	31,080	34,896
Peach	17,536	14,358	18,647	20,054	19,815
Pear	1,031	1,787	3,521	5,758	3,905
TOTAL	41,540	35,242	50,242	56,892	58,616

Source: U.S. Census Data

CANNED FRUIT MIXTURES

Over the past five years, exports of canned fruit mixtures expanded largely in the strategic markets of Canada, Japan, and Hong Kong (see Table 11). In 1992/93, declines in shipments to Canada and Japan were more than offset by gains elsewhere, particularly Saudi Arabia, the Philippines, and Central America (Honduras and Costa Rica). Although the export campaign for the current year has just begun, early shipment data give reason for some optimism. U.S. canned fruit mixtures exports thus far in marketing year 1993/94 (Jun-Aug) are 7,789 tons, about 26 percent above the same period last year.

Table 11. United States: Canned Fruit Mixture Exports
(Marketing Years 1988/89 through 1992/93) 1/
(Metric Tons, net weight) 2/

Country	1988/89	1989/90	1990/91	1991/92	1992/93
Canada	4,758	3,830	7,809	7,770	6,542
Japan	7,201	3,373	4,786	6,398	4,708
Hong Kong	1,433	929	2,782	3,593	3,753
Philippines	1,597	2,905	2,636	2,164	3,337
Singapore	1,403	1,798	2,105	2,089	2,662
Saudi Arabia	1,018	821	1,977	1,514	3,096
Panama	530	851	1,119	1,100	1,138
Taiwan	447	376	649	984	1,709
Mexico	946	615	538	724	501
Sweden	304	789	753	709	898
Others	3,336	2,810	2,920	4,035	6,552
Total	22,973	19,097	28,074	31,080	34,896

Source: U.S. Census Data

1/ Marketing year is Jun/May.

2/ One metric ton is 48.99 standard 45lb. net cases of 24x2 1/2 cans

CANNED PEACHES

U.S. canned peach exports in 1992/93 witnessed sustained growth in Canada, Mexico, and Middle East markets, and a decline in Asia, principally Japan (see Table 12). Fierce competition came from Greece, which looked to non-traditional markets outside the EC for its enormous export surplus. A lop-sided world supply situation combined with economic downturn in many important markets (e.g., Canada, Germany, Japan) added to inventories of many exporters.

U.S. canned peach exports in 1992/93 were assisted by application of a special Export Enhancement Program (EEP) designed to compensate the U.S. industry for the EC's failure to comply with the U.S.-EC Canned Fruit Agreement during the previous year. By the expiration of the EEP on July 9, 1993, bonuses (totaling about \$500,000) covering shipments of about 4,188 tons of canned product had been paid to exporters.

A smaller peach pack in the United States and in many EC countries should improve trade prospects in 1993/94. The reduction in U.S. production is a result of steps taken by growers in California including: 1) early pruning and thinning for larger fruit, and 2) implementing a voluntary tree-pull program. See the following table for elements of the U.S. domestic canned peach situation. Preliminary shipment data for the current season show that canned peach exports are running ahead of last year's pace during the Jun-Aug period.

**Table 12. United States: Canned Peach Exports
(Marketing Years 1988/89 through 1992/93) 1/
(Metric Tons, net weight) 2/**

Country	1988/89	1989/90	1990/91	1991/92	1992/93
Japan	9,013	5,850	7,420	7,593	5,812
Taiwan	3,154	1,569	2,654	2,702	1,894
Canada	1,755	1,183	1,857	2,427	2,691
Hong Kong	489	379	1,347	1,812	1,467
Mexico	273	1,653	653	1,581	1,775
Singapore	499	941	597	640	754
Philippines	376	755	412	552	744
Panama	407	385	358	410	266
Colombia	19	29	73	267	58
Saudi Arabia	273	249	267	266	532
Others	1,278	1,365	3,009	1,804	1,972
Total	17,538	14,358	18,647	20,054	19,815

Source: U.S. Census Data

1/ Marketing year is Jun/May.

2/ One metric ton is 48.99 standard 45lb. net cases of 24x2 1/2 cans

**U.S. Cling Peach Situation and Outlook 1/
(Metric Tons)**

	1991/92	1992/93	1993/94
Deliveries to			
Canners	498,326	570,007	528,959
Paid tons Packed	468,060	537,107	498,781
Peach Pack <u>2/</u>	16,908	19,922	19,955
Beginning Stocks	2,271	1,479	2,901
Total Supply <u>3/</u>	19,179	21,401	22,856
Disappearance <u>4/</u>	17,700	18,500	20,000
Ending Stocks	1,479	2,901	2,856

Source: California Cling Peach Advisory Board, 1993

1/ Data are not official USDA data and are intended to show trends in the U.S. situation; 1993/94 data are forecast.

2/ Pack estimates are for crop year.

3/ Total supply implies U.S. production and does not include considerable imports, which for the three marketing years presented were: 15,018 tons, 19,261 tons, and 21,921 tons; imports are primarily from Greece.

4/ Disappearance includes exports.

CANNED PEARS

U.S. pear exports fell in 1992/93 (see Table 13). However, if France were excluded from review, the picture would instead be one of stagnation. A huge Italian pear pack and large export availabilities dampened market opportunities for the United States in 1992/93. Expected smaller supplies in the selected competitor countries could draw down stocks, firm prices, and improve prospects for U.S. canned pear exports in 1993/94.

Table 13. United States: Canned Pear Exports
(Marketing Years 1988/89 through 1992/93) 1/
(Metric Tons, net weight) 2/

Country	1988/89	1989/90	1990/91	1991/92	1992/93
France	0	0	0	1,801	76
Canada	96	259	552	1,288	1,508
Japan	221	442	916	845	506
Mexico	9	362	239	381	321
Sweden	17	19	325	291	135
Denmark	0	0	195	245	71
Costa Rica	9	26	106	188	111
Italy	0	17	6	118	0
Singapore	62	82	147	109	76
Others	617	580	1,035	492	1,096
Total	1,031	1,787	3,521	5,758	3,905

Source: U.S. Census Data

1/ Marketing year is Jun/May.

2/ One metric ton is 48.99 standard 45lb. net cases of 24x2 1/2 cans.

(Ross Kreamer, 202-720-9903)

Canned Peaches: Production, Supply, and Distribution
(Metric Tons, net weight)/1

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	3,800	34,300	31,500	69,600	2,700	61,600	5,300
1991/92	5,300	31,400	27,800	64,500	3,800	57,700	3,000
1992/93	3,000	30,800	26,100	59,900	3,000	54,900	2,000
Greece							
1990/91	35,500	251,876	604	287,980	247,767	16,713	23,500
1991/92	23,500	317,542	514	341,556	309,836	18,720	13,000
1992/93	13,000	364,000	400	377,400	280,000	16,400	81,000
Italy							
1990/91	46,600	72,000	11,300	129,900	41,200	51,000	37,700
1991/92	35,700	81,000	11,400	130,100	44,000	51,000	35,100
1992/93	35,100	98,000	8,500	141,600	40,000	51,000	50,600
Spain							
1990/91	18,203	65,000	8,912	92,115	8,301	77,000	6,814
1991/92	6,814	91,400	6,713	104,927	9,758	79,169	16,000
1992/93	16,000	127,500	3,000	146,500	13,000	95,500	38,000
Total EC							
1990/91	104,103	423,176	52,316	579,595	299,968	206,313	73,314
1991/92	73,314	521,342	46,427	641,083	367,394	206,589	67,100
1992/93	67,100	620,300	38,000	725,400	336,000	217,800	171,600
Argentina							
1990/91	1,149	31,000	4,000	36,149	1,889	34,111	149
1991/92	149	49,000	0	49,149	13,000	34,500	1,649
1992/93	1,649	29,000	5,000	35,649	1,200	34,300	149
Australia							
1990/91	9,492	30,000	3,583	43,075	19,770	18,900	4,405
1991/92	4,405	32,000	2,545	38,950	12,438	18,900	7,612
1992/93	7,612	35,000	2,400	45,012	17,000	18,900	9,112
Chile							
1990/91	950	24,000	0	24,950	17,000	7,600	350
1991/92	350	31,000	0	31,350	20,200	10,000	1,150
1992/93	1,150	30,000	0	31,150	20,500	10,000	650
Japan							
1990/91	6,000	20,927	42,189	69,116	10	66,106	3,000
1991/92	3,000	22,208	53,569	78,777	5	68,772	10,000
1992/93	10,000	21,000	40,000	71,000	2	62,998	8,000
South Africa							
1990/91	29,722	65,815	0	95,537	56,679	11,650	27,208
1991/92	27,208	65,557	0	92,765	50,840	11,857	30,068
1992/93	30,068	74,619	0	104,687	52,500	11,875	40,312
Total							
1990/91	151,416	594,918	102,088	848,422	395,316	344,680	108,426
1991/92	108,426	721,107	102,541	932,074	463,877	350,618	117,579
1992/93	117,579	809,919	85,400	1,012,898	427,202	355,873	229,823

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ The 1992/93 marketing year includes 1992 packs in the Northern Hemisphere and early 1993 packs in the Southern Hemisphere.

note: Data for the United States are no longer available.

Canned Pears: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	6,900	24,500	20,800	52,200	1,400	43,400	7,400
1991/92	7,400	18,400	25,800	51,600	1,500	46,200	3,900
1992/93	3,900	26,500	18,500	48,900	500	46,400	2,000
Italy							
1990/91	7,360	53,000	2,470	62,830	32,760	15,500	14,570
1991/92	14,570	34,000	2,480	51,050	29,700	15,000	6,350
1992/93	6,350	76,000	1,100	83,450	33,400	15,000	35,050
Spain							
1990/91	0	11,800	309	12,109	5,758	6,351	0
1991/92	0	8,800	343	9,143	4,443	4,700	0
1992/93	0	13,000	1,000	14,000	6,000	5,500	2,500
Total EC							
1990/91	14,260	89,300	23,579	127,139	39,918	65,251	21,970
1991/92	21,970	61,200	28,623	111,793	35,643	65,900	10,250
1992/93	10,250	115,500	20,600	146,350	39,900	66,900	39,550
Australia							
1990/91	16,946	42,000	580	59,526	41,466	6,000	12,060
1991/92	12,060	53,500	858	66,418	38,017	6,200	22,201
1992/93	22,201	45,000	500	67,701	41,000	6,500	20,201
Japan							
1990/91	600	556	6,948	8,104	19	7,385	700
1991/92	700	571	7,411	8,682	10	7,872	800
1992/93	800	550	7,500	8,850	5	8,145	700
South Africa							
1990/91	7,292	27,668	0	34,960	25,104	2,876	6,980
1991/92	6,980	20,798	0	27,778	17,325	2,900	7,553
1992/93	7,553	28,635	0	36,188	17,700	2,875	15,613
Total							
1990/91	39,098	159,524	31,107	229,729	106,507	81,512	41,710
1991/92	41,710	136,069	36,892	214,671	90,995	82,872	40,804
1992/93	40,804	189,685	28,600	259,089	98,605	84,420	76,064

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ The 1992/93 marketing year includes 1992 packs in the Northern Hemisphere and early 1993 packs in the Southern Hemisphere.

note: Data for the United States are no longer available.

Canned Fruit Mixtures: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumptn.	Ending Stocks
France							
1990/91	10,300	24,900	31,400	66,600	5,000	50,400	11,200
1991/92	11,200	23,000	27,900	62,100	5,900	47,400	8,800
1992/93	8,800	24,700	34,000	67,500	8,000	49,500	10,000
Greece							
1990/91	503	22,618	29	23,150	20,748	1,500	902
1991/92	902	26,930	151	27,983	25,793	1,400	790
1992/93	790	22,440	100	23,330	18,000	1,500	3,830
Italy							
1990/91	15,200	72,000	1,060	88,260	62,620	25,640	0
1991/92	0	75,000	1,500	76,500	58,000	18,500	0
1992/93	0	85,000	1,200	86,200	64,000	22,200	0
Total EC							
1990/91	26,003	119,518	32,489	178,010	88,368	77,540	12,102
1991/92	12,102	124,930	29,551	166,583	89,693	67,300	9,590
1992/93	9,590	132,140	35,300	177,030	90,000	73,200	13,830
Australia							
1990/91	1,769	30,400	0	32,169	21,035	10,900	234
1991/92	234	33,000	0	33,234	22,014	10,800	420
1992/93	420	31,000	0	31,420	20,000	10,800	620
Chile							
1990/91	50	3,100	0	3,150	2,800	300	50
1991/92	50	2,650	0	2,700	2,350	310	40
1992/93	40	2,730	0	2,770	2,400	320	50
Japan							
1990/91	1,000	4,173	10,197	15,370	0	13,870	1,500
1991/92	1,500	3,370	11,098	15,968	0	13,968	2,000
1992/93	2,000	3,500	11,500	17,000	0	14,500	2,500
South Africa							
1990/91	5,377	42,378	0	47,755	37,229	4,961	5,565
1991/92	5,565	50,372	0	55,937	35,703	4,954	15,278
1992/93	15,278	48,494	0	64,772	36,000	4,970	22,802
Total							
1990/91	34,199	199,569	42,686	276,454	149,432	107,571	19,451
1991/92	19,451	214,322	40,649	274,422	149,762	97,332	27,328
1992/93	27,328	217,864	46,800	291,992	148,400	103,790	39,802

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ The 1992/93 marketing year includes 1992 packs in the Northern Hemisphere and early 1993 packs in the Southern Hemisphere.

note: Data for the United States are no longer available.

Canned Apricots: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
Australia							
1990/91	4,007	8,700	905	13,612	2,645	7,200	3,767
1991/92	3,767	8,800	1,255	13,822	1,860	6,800	5,162
1992/93	5,162	7,400	1,300	13,862	2,000	6,700	5,162
Greece							
1990/91	308	47,352	109	47,770	38,224	1,200	8,346
1991/92	8,346	36,730	22	45,098	42,235	1,200	1,663
1992/93	1,663	45,782	100	47,545	30,000	1,200	16,345
South Africa							
1990/91	2,675	16,720	0	19,395	15,900	745	2,750
1991/92	2,750	24,308	0	27,058	19,000	758	7,300
1992/93	7,300	24,247	0	31,547	19,500	765	11,282
Spain							
1990/91	13,076	12,000	75	25,151	8,196	5,500	11,455
1991/92	11,455	28,595	208	40,258	29,294	5,464	5,500
1992/93	5,500	17,500	100	23,100	17,500	5,600	0
Total							
1990/91	20,066	84,772	1,089	105,928	64,965	14,645	26,318
1991/92	26,318	98,433	1,485	126,236	92,389	14,222	19,625
1992/93	19,625	94,929	1,500	116,054	69,000	14,265	32,789

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans.

2/ The 1992/93 marketing year includes 1992 packs in the Northern Hemisphere and early 1993 packs in the Southern Hemisphere.

note: Data for the United States are no longer available.

World Raisin Situation

Raisin and sultana production in the four major Northern Hemisphere producers is forecast at 532,290 tons (packed weight basis) for 1993/94, down less than 1 percent from the previous year, and the third consecutive decline in production. Lower production in Greece and Mexico should help U.S. producers, who have been struggling with flat export demand. Promotional efforts in the traditional markets like the EC, Japan, and Canada, along with emerging markets like Eastern Europe, Russia, and China, should pay dividends in the coming years. U.S. exports in 1993/94 are forecast to be up slightly over 1992/93, which along with stronger prices, should increase total value of exports.

Production of raisins and sultanas in the four major Northern Hemisphere countries is forecast at 532,290 tons (packed weight basis) for 1993/94, down less than 1 percent from the previous year. While production is expected to increase in Turkey, it is forecast to decline in the United States, Mexico, and Greece. The higher production in Turkey is due to better care, expanded trellising of sultana grape vineyards, and favorable weather conditions.

The expected lower Greek production is due to adverse weather conditions in August which were characterized by strong and warm winds in both Crete and the Peloponnesus and affected both quantity and quality. In Mexico, the decline was because of flowering problems in the spring, high credit costs, and a low production year in the alternating production cycle.

Production in 1992/93 for eight major producing countries is estimated at 625,417 tons, down 3 percent from the previous year. This is the third consecutive decline in world-wide production.

Turkey

Turkish seedless raisin production for 1993/94 is forecast at 163,000 metric tons, a new record. This is about 9 percent above the revised 1992/93 output of 150,000 tons. Despite an area decline of about 3 percent, a record harvest is expected in 1993/94. Better care, expanded trellising of sultana grape vineyards, and favorable weather conditions are responsible for this larger output.

Weather conditions have been very favorable for grapes this year. Continuing dry weather has enabled farmers to harvest and dry grapes without any rain damage. The extension of warm weather until mid-October helped the formation of the record large crop.

Export sales are currently running ahead of last year. Trade data released by the Exporters Association show that during the first five weeks of 1993/94 about 21,000 tons of raisins (1993 crop) were booked for export, about fifty percent higher than it was for the same period last year. Export bookings this season have been registered with an average price of about \$1,100 per ton, the same as last year.

For raisins exported in 1992/93, the Government's decision to lift the export tax of

\$60 per ton, effective September 1, 1992, was not sufficiently effective in making Turkish raisins more competitive with Iranian raisins. Iran is Turkey's major competitor followed by Greece. Turkish exporters are now offering No.9 raisins at prices around \$1,100 per ton f.o.b., while Iranian raisins are reportedly being offered at a range of \$800 to \$850 per ton c.i.f. European ports. Still, because of the decline in production world-wide, overall export demand for Turkish raisins is high.

The EC continues to be the major market for Turkish raisins. The United Kingdom was the largest market in marketing year 1992/93, buying 26,029 tons of raisins during the first ten months. The United Kingdom had bought 28,700 tons of raisins in 1991/92. Other major buyers were the Netherlands, Italy, and Germany. Exports to the United States increased to 1,196 tons during the first ten months in 1992/93 compared to only 610 tons in the previous marketing year.

There are no direct subsidies for raisin exports. Daily depreciation of the Turkish Lira against foreign currencies, however, is an indirect incentive for raisin exports. The exchange rate for the dollar has increased from about TL 7,500 in October 1992 to about TL 12,300 in October 1993.

The Minimum Import Price (MIP) and various other internal measures taken by the EC continue to restrict Turkish competitiveness. In accord with the EC's MIP system for raisins, the Turkish Government establishes comparable minimum export prices in the currency of each EC member country based on the EC MIP of ECU 893.3 per ton c.i.f. However, there are no export price restrictions for raisins sold to non-EC countries. Raisin exports from Turkey are primarily in 14-kg boxes, and exports in small retail packs continue to be insignificant.

The Government has increased the support price for raisins by 53 percent. The agricultural sales cooperative, TARIS, again has been instructed to purchase raisins on the Government account. This increase in support prices is less than the decline in the value of the Turkish lira against the U.S. dollar, which declined in value 64 percent in the same time period. In addition to support prices, TARIS pays premiums for raisins

produced from trellised vines and an additional premium is paid for raisins dried on concrete grounds. The premiums are intended to improve the cleanliness and quality of raisins. However, even with these additional payments, Turkish raisins are becoming less competitive with Iranian raisins.

As in years past, TARIS is slow in buying raisins and it is facing payment difficulties because not enough credits have been made available. To help counteract the eroding effect of inflation, the support price is to be increased by TL 250 per kilo per month for delayed payments. Thus, the support price for No.9 raisins, TL 9,500 per kilogram through the end of September, is raised to TL 9,750 per kilo in October, TL 10,000 in November and TL 10,250 per kilogram after December 1, 1993. This monthly increase is still somewhat lower than the inflation rate.

Although TARIS is authorized to support the market on behalf of the Government and can physically handle the entire crop if necessary, current indications suggest that TARIS will purchase around 60,000 tons, about 40 percent of the entire raisin crop. This amount is higher than the 30,000 tons purchased last year.

The spot raisin (St. No. 9) prices in the Izmir Commodity Exchange are around TL 8,600 per kilogram. At the current exchange rate of around TL 12,300 per dollar, these free market prices correspond to about \$700 per ton. Taking into account an estimated processing and packing cost (f.o.b.) of \$350 per ton, raisins bought at TL 8,600 per kilo could not be offered below \$1,050 per ton f.o.b. While the pre-processing cost of \$700 per ton is nearly \$100 less than last year, higher processing and packing costs have eaten into that decline. Overall export prices should therefore be only slightly lower than 1992/93.

Private exporters, anticipating further devaluation of the Turkish lira against European currencies, expect that seasonal exports in 1993/94 will total around 130,000 tons compared with the revised estimate of 105,000 tons in 1992/93. The main reason for the decline in 1992/93 was high support prices announced by the government which increased costs making Turkish raisins less competitive against Iranian raisins.

Grapes of numerous varieties are produced throughout Turkey, but seedless (sultana) grapes for raisins are commercially produced only in a few provinces in the Aegean region - namely Izmir, Manisa, and Denizli. Total sultana area in 1993/94, which has been relatively stable during the past several years, is estimated at around 60,000 hectares. Only about 10 percent of total vineyard area in Turkey is for sultana production.

Total sultana vineyard area in 1993 is estimated at 60,391 hectares compared with the 61,690 hectares in 1992. Some sultana vines in the region have been replaced with fruit tree plantations. Young vineyards beginning commercial production this year, however, partially offset the decline in the total vineyard area. Some new vines in Manisa and Izmir provinces are expected to bear fruit in 2 years. Although most of these new vineyards in the region were intended for fresh table grape production, the abundance of other grape varieties limit the potential fresh use of sultana grapes unless exports improve.

Domestic raisin consumption in 1993/94 is estimated at 30,000 tons, 14 lower than in 1992/93 because TEKEL (State Tobacco and Alcohol Monopoly) bought less raisins for alcohol making. Weather has been good for drying and therefore, losses due to rain damage will be less this year. The lower 1993/94 consumption estimate is based on the assumption that TEKEL will absorb about 14,000 tons of sultana raisins for alcohol making and about 16,000 tons of raisins will be consumed as food.

Greece

The Greek 1993/94 crop of dried sultanas is estimated at 37,000 tons which, together with a smaller stock carry-in, puts total supply at 45,000 tons. Stiff competition from third country competitors, mainly Turkey, has limited Greek trade prospects.

This year, local cooperatives in Crete and Ministry of Agriculture sources were expecting a satisfactory recovery of the crop from the Phylloxera problem. These expectations were not fulfilled due to adverse weather conditions in August, characterized by strong, warm winds in both Crete and the Peloponnesus which affected

both quantity and quality. However, the actual crop recovery from Phylloxera is difficult to estimate, due to farmer preferences to sell to the fresh market and wineries.

The rootstock replacement program is in progress. By the end of the century production of dried fruit could increase to 70,000 tons under the best circumstances (plant health conditions, EC favorable agricultural policy developments, and willingness of farmers will to stay with the crop).

Cooperative organizations on the island of Crete are faced with continuing financial problems, making them unable to purchase all quality grades delivered by farmers. On the other hand, traders buy selectively only those amounts considered suitable for export. Exports have continued to decline significantly since 1989, because of the small crops due to both the phylloxera disease, and competition from countries with lower production costs.

Domestic consumption of dried sultanas fluctuates 4,000 and 5,000 tons each year. About 50 percent of the domestically consumed sultanas is utilized by the bakery and confectionery sector, while the remainder is used as a snack food, mixed with nuts.

According to the Ministry of Agriculture, crop quality in 1993 is considered to be better than that in 1992 with the largest percentage of raisins graded No.4 and No.5 (about 75 percent). Very limited amounts are expected to be in the quality grades No.1 and No.2. In the past, with more protectionist policies implemented by both the Greek government and the EC, the percentage unsuitable for human consumption was about 14-15 percent which was used for animal feed and distillation. Today, due to stiff competition from other producing countries outside the EC, quality parameters are more seriously taken into consideration and percentages of unsuitable amounts have been reduced to the minimum.

The major Greek agricultural research facility, the Institute for Vegetable, Floriculture and Vine Research in Iraklion, Crete, has been promoting practices that improve raisin quality. The Institute is promoting the use of fatty acids rather than potassium for preparing grapes for

drying. Dipping of grapes in a solution of 0.6 percent olive oil and fatty acids reduces the drying period 30 to 50 percent and gives a more desirable color to the raisins. While the cost is 50 percent greater than the normal method, it is small compared to the total cost of the product. Profits are higher because of better quality and less risk of unfavorable weather. The Institute has also found that spraying rather than dipping the grapes reduces time and expense. This practice began experimentally 3 years ago and today has been rapidly adopted by most growers.

As a result of these efforts, quality grades improve every year and foreign matter is reduced when the product is delivered by the farmer to the processor. The new EC regulations for raisins, which no longer pay based on output, but based only on per area unit, create an incentive to improve quality over quantity.

Mexico

Mexican raisin production for 1993/94 (August/July) is forecast to decrease to 10,000 tons, 23 percent below 1992/93 production. This decrease is due to flowering problems in the spring, high credit costs, and a "low" production year in the alternating production cycle. Mexican raisin exports are expected to fall to 4,000 tons because of the low production, and Mexican raisin imports are expected to increase to 4,000 tons to meet domestic demand. Domestic consumption is forecast to increase to 10,000 tons because of increased industrial uses for raisins.

Weather this year was not ideal. Flowering problems in April and May caused by hotter than normal days and cooler than normal nights contributed to the decline in production.

Costs associated with raisin production have increased substantially over the last several years, higher than the rate of inflation. Producers agree that the most costly inputs to produce raisins are: electricity, fertilizers, labor, chemicals and interest payments.

The main reason for increased production costs is higher electricity rates associated with irrigation. One-hundred percent of raisin

production is irrigated. According to some sources, since the government lifted the subsidy for electricity two years ago, electricity costs have increased 90 percent. Another major increase in the cost of production has been fertilizer, which was also subsidized until three years ago and has since increased more than 100 percent. Labor costs have also been more expensive this year as most of the labor comes to Sonora from distant areas such as Jalisco and Michoacan.

OPTIMAL COST OF PRODUCTION FOR A VINEYARD USED FOR RAISINS IN SONORA

	1993 Pesos/ha.	1993 \$/acre	1992 Pesos/ha.	1992 \$/acre
Vineyard preparation				
Includes: cultivation, fertilizers, insecticides, irrigation, water, labor, chemical application, weed control	5,700	\$681	5,000	\$625
Harvesting				
Includes: harvesting, drying, labor, other practices	1,300	\$155	1,200	\$150
Insurance				
Includes: insurance, taxes	1,300	\$155	1,300	\$162
Total	8,300	\$992	7,500	\$937
Exchange rate of peso to U.S. Dollar, October		3.294		3.152

Source: Raisin producers, Secretaria de Agricultura (SARH)

Planted and harvested area for raisins have been relatively constant over the last several years, at 5,000 hectares. Despite the fact that growers view raisin production generally as a profitable enterprise, they are not increasing planted area or using as many inputs because of the high cost of financing. In any year, the amount of grapes destined for raisin production is a result of the price relationship between table grapes, wine and juice grapes, and raisins. Producers commented that some farmers are getting out of table grape production and into grape juice, wine and raisin production because of the unfavorable price relationship that has existed with table grapes for the last three years.

Because of the benefits derived from selling into the export market, such as payment on delivery, raisin processors prefer to first sell their higher quality product for export, even if the price is lower than that available in the domestic market. Mexican processors then import lower quality raisins to meet domestic demand.

Domestic consumption has increased over the last two years as incomes have gone up. Industrial uses of raisins, such as in cereals, have significantly increased. Moreover, advertising campaigns in the past several years have

succeeded in increasing the demand for snack raisins. Bakeries and food processors are expected to remain the largest consumers of Mexican raisins, after the export market. Christmas and Holy Week are the most important consumption seasons for raisins.

Mexican raisin exports are expected to decrease to 4,000 tons in 1993/94 because of lower production and increased domestic demand. Typically, the highest quality production is expected to be exported (mainly to the United States), and the rest will be packaged for consumers or used by the domestic baking and food processing industries.

Mexican raisin imports are forecast to increase to 4,000 tons in 1993/94 because of tight domestic supplies. In the past, Mexico imported raisins almost solely from the United States. However, Mexico is now buying a substantial amount of Chilean raisins. In 1992, around 20 percent of Mexican raisin imports were from Chile. Competition for the Mexican raisin market from Chile will continue until U.S. exports receive the tariff reduction benefits of the North American Free Trade Agreement.

Imported raisins from everywhere except Chile

are assessed an import tariff of 20 percent under classification number 0806.20.01. As a result of the Mexico-Chile Free Trade Agreement, implemented on January 1, 1992, Chilean raisins are currently assessed an import tariff of 7.5 percent for 1993. The tariff will be phased out by 1995.

Upon the implementation of the North American Free Trade Agreement (NAFTA), Mexico's 20 percent tariff on imported U.S. raisins and the U.S.'s tariff on imported Mexican raisins will be eliminated immediately. This is expected to allow an expanded trade of raisins between the two countries. However, this expansion will be limited by the storage and handling capacity of the Mexican wholesale markets. In addition, U.S. raisins will be able to compete more effectively with imported raisins from Chile.

United States

California is the only state with commercial raisin production. The latest trade reports indicate that the 1993/94 crop will reach 322,290 tons, packed weight basis, down 3 percent from last year.

Exports during the 1992/93 marketing year were 125,798 tons, according to Bureau of the Census data, less than 1 percent below the previous year. While the three largest markets (the United Kingdom at 25,585 tons, Japan at 23,290 tons, and Germany at 13,256 tons) all showed declines (down 4, 7, and 2 percent, respectively) many countries saw increases. Exports to Hong Kong increased by 46 percent to 3,061 tons. Exports to Denmark increased by 29 percent to 7,205 tons. Exports to Malaysia increased by 54 percent to 2,531 tons.

At the same time, imports declined to 6,717 tons, the third straight annual decline. This is down 18 percent from the 1991/92 figure of 8,225 tons. Imports from Chile dropped dramatically, to 1,441 tons, off 66 percent. Imports from Mexico increased slightly, to 3,662 tons. Imports from Turkey increased to 1,526 tons.

Trade in Major Importing Countries

Trading patterns in the largest import markets vary widely from country to country. In Canada, raisins come from many countries, with most coming from the United States, Australia, and Turkey. Canadian consumers differentiate between the American-style, darker colored raisin, and the light-skinned sultana. Per capita consumption is relatively high at about 1.05 kilograms per person per year.

In contrast, Japan buys most of its raisins from the United States. In this market, where there is not a long tradition of eating raisins, consumption is only about 0.22 kilograms per person per year.

The individual member states of the European Community have different buying patterns, and rely on different markets for their import supply. The United Kingdom is the world's largest importer and consumer of dried vine fruits, with per capita consumption at 1.65 kilograms per year. Competition for this market is very intense, with 8 major producing countries supplying either raisins or sultanas. Raisins are supplied by the United States, South Africa, Afghanistan, Iran, and Chile. Sultanas are supplied by Greece, Turkey, and Australia.

The United Kingdom market has the strongest product differentiation between raisins and sultanas in Europe. The light colored sultana is used mainly in home baking, as well as in manufactured food products like cereals and breads. Raisins are used in home baking and snacking, as well as in salads, desserts, and in breakfast cereals.

The U.K. food marketing system is similar to the system set up in the United States, with major chain stores, coops, and independent grocers. Importers, brokers, distributors, and wholesalers are part of the distribution system, especially with smaller grocery chains and independent retailers. According to market research, over 50 percent of retail consumers buy raisins just once a year. In the price-sensitive industrial market, Afghani and Iranian raisins are much cheaper than American product.

In Germany, the second largest market for U.S. raisins, competition is also very strong. The

product differentiation between raisins and sultanas is not as defined in Germany as in the United Kingdom. Still, consumers prefer the light sultanas for baking, and raisins for snacking or mixing with nuts. Per capita consumption is 0.87 kilograms per year.

Iran was Germany's largest supplier in this price-conscious market in 1992, with Iranian raisins able to enter the EC below the Minimum Import Price (MIP), even with the addition of the "countervailing charge." The German market is highly fragmented, and in the eastern Länder still undergoing great change. There are over 80 brands of raisins and sultanas in Germany. Informing the retail consumer of quality differences in such a diffuse industry is very difficult and expensive.

Where Germany and the United Kingdom are the largest importers and consumers of raisins, France, Italy, and Spain, import and consume relatively little. Each of these countries has consumption levels slightly higher than Japan's, at about 0.35 kilograms per person per year.

In comparison, U.S. consumers eat about 0.77 kilograms per person each year - more than Japan, France, Italy, or Spain, but less than Canada, Germany, and the United Kingdom.

(Mark Thompson, 202-720-6877)

RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION SELECTED COUNTRIES 1990/91 TO 1993/94 1/ (METRIC TONS, PACKED WEIGHT)

	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption 2/	Ending Stocks	Total Distribution
NORTHERN HEMISPHERE								
Greece								
1990/91	46,680	37,000	0	83,680	50,000	28,000	5,680	83,680
1991/92	5,680	38,000	250	43,930	25,000	6,500	12,430	43,930
1992/93	12,430	38,000	60	50,490	35,000	7,810	7,680	50,490
1993/94	7,680	37,000	50	44,730	35,000	7,200	2,530	44,730
Mexico								
1990/91	0	12,500	1,000	13,500	5,800	7,000	700	13,500
1991/92	700	9,000	2,000	11,700	4,200	7,500	0	11,700
1992/93	0	13,000	1,000	14,000	5,000	9,000	0	14,000
1993/94	0	10,000	4,000	14,000	4,000	10,000	0	14,000
Turkey								
1990/91	11,756	149,000	2,000	162,756	128,471	24,500	9,785	162,756
1991/92	9,785	145,000	541	155,326	131,016	21,000	3,310	155,326
1992/93	3,310	150,000	100	153,410	105,000	35,000	13,410	153,410
1993/94	13,410	163,000	0	176,410	130,000	30,000	16,410	176,410
United States 3/								
1990/91	176,304	335,115	10,732	522,151	133,605	198,698	189,848	522,151
1991/92	189,848	297,393	8,225	495,466	126,675	192,314	176,477	495,466
1992/93	176,477	332,760	6,717	515,954	125,798	198,218	191,938	515,954
1993/94	191,938	322,290	6,000	520,228	128,000	198,000	194,228	520,228
NORTHERN HEMISPHERE SUBTOTAL								
1990/91	234,740	533,615	13,732	782,087	317,876	258,198	206,013	782,087
1991/92	206,013	489,393	11,016	706,422	286,891	227,314	192,217	706,422
1992/93	192,217	533,760	7,877	733,854	270,798	250,028	213,028	733,854
1993/94	213,028	532,290	10,050	755,368	297,000	245,200	213,168	755,368
SOUTHERN HEMISPHERE								
Australia 4/								
1990/91	1,204	85,478	8,620	95,302	49,151	31,484	14,667	95,302
1991/92	14,667	96,743	6,064	117,474	46,574	32,000	38,900	117,474
1992/93	38,900	42,634	4,500	86,034	48,500	31,000	6,534	86,034
Chile								
1990/91	250	33,400	0	33,650	29,441	4,020	189	33,650
1991/92	189	20,000	0	20,189	16,059	4,020	110	20,189
1992/93	110	22,000	0	22,110	18,000	4,020	90	22,110
South Africa, Republic of								
1990/91	9,027	30,634	0	39,661	19,423	8,340	11,898	39,661
1991/92	11,898	40,053	0	51,951	23,589	9,000	19,362	51,951
1992/93	19,362	27,023	0	46,385	26,200	9,050	11,135	46,385
SOUTHERN HEMISPHERE SUBTOTAL								
1990/91	10,481	149,512	8,620	168,613	98,015	43,844	26,754	168,613
1991/92	26,754	156,796	6,064	189,614	86,222	45,020	58,372	189,614
1992/93	58,372	91,657	4,500	154,529	92,700	44,070	17,759	154,529
WORLD TOTAL								
1990/91	245,221	683,127	22,352	950,700	415,891	302,042	232,767	950,700
1991/92	232,767	646,189	17,080	896,036	373,113	272,334	250,589	896,036
1992/93	250,589	625,417	12,377	888,383	363,498	294,098	230,787	888,383

1/ 1993/94 figures are forecast. Northern hemisphere marketing years begin in August, except September in Turkey. Marketing years for Southern Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, except December 1 in South Africa and March 1 in Australia. 2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ Includes currants. U.S. production data have been converted to a packed weight basis in order to align them with the other supply and distribution statistics. U.S. import and export data are from U.S. Department of Commerce, Bureau of Census. 4/ Includes sultanas and lexia raisins (mostly muscats).

PISTACHIO PRODUCTION AND EXPORTS IN SELECTED COUNTRIES CONTINUE EXPANSION

Pistachio production and exports in selected countries are forecast to set records in 1993/94, continuing their upward trend for a fourth straight year. Production increases over 1992/93 in Turkey, the United States and Syria, even though this is an off-year in the alternate bearing pistachio production cycle for the latter two countries, were responsible for the output record. U.S. pistachio exports are forecast to hit a new high in the current year, rising 15 percent to 31,500 tons. Strong demand for U.S. pistachios in Pacific Rim countries are behind the buoyant export picture.

Pistachio production and exports in 1993/94 in selected countries are forecast to expand for the fourth straight year. Pistachio production in selected countries is expected to reach a record 147,600 metric tons, inshell basis. An official USDA estimate of U.S. pistachio production will not be available until January. The California Pistachio Commission reports that deliveries through October 31 totaled approximately 67,950 tons, surpassing 1992/93's record production of 66,678 tons. Pistachio production in 4 countries outside of the United States in 1993/94 season is forecast to total 80,100 tons, up 78 percent from 1992/93. Data for Iran are not available. Led by a 15 percent increase in U.S. exports, pistachio exports from the surveyed countries are forecast to rise 17 percent to 39,950 tons. Gains in domestic consumption in the other producing countries are expected to limit their export growth.

Greece

Greek pistachio production in 1993/94 is forecast at 4,100 tons, down 11 percent from last season because of the biannual tree cycle. In calendar year 1992, Greece imported 1,509 tons of pistachios, of which 881 tons were purchased directly from Iran and 460 tons were purchased from Germany. Trade sources report that imports from Germany were also Iranian product. Due to firm domestic demand, Greece exports only marginal quantities of pistachios.

Italy

Pistachio output in 1993/94 is forecast at 4,000 tons, up sharply from last season's weather-damaged off-year crop, and one-third larger than the previous on-year harvest in 1991/92. Weather during the growing season was highly favorable for crop development. Grower prices for the 1992/93 crop were down due to strong competition from Iranian pistachios.

The rising popularity of roasted, salted pistachios as a snack over the past decade has fueled an increase in Italian consumption. Due to their low price, imports of Iranian product have captured most of the expanded demand. Total Italian pistachio imports for 1993/94 are forecast at 9,500 tons, up almost 6 percent over last year. Italian exports, forecast at 2,000 tons for 1993/94, are primarily shelled, peeled pistachios destined for northern Europe.

Syria

Despite the fact it should be an "off-year" in the bearing cycle, Syrian pistachio production in 1993/94 is forecast at a record 22,000 tons, up 10 percent from last season. A 14-percent increase in the number of bearing trees and a 4-percent increase in per tree yield are the major reasons for the expected rise in output. In addition, the crop, which is mainly grown under rain fed conditions, benefitted from adequate spring rainfall. No major pest problems or disease outbreaks have been reported, so a good quality crop is expected.

At the onset of the 1993/94 season, Syria's pistachio tree population was forecast at 14 million, of which bearing trees numbered 4 million. Further production increases in Syria are anticipated as additional trees come into production and the Syrian Government continues to encourage new plantings by providing growers with seedlings at nominal prices and restricting imports.

As production has risen in recent years, so have Syrian pistachio exports. Foreign shipments in 1993/94 are forecast at 4,000 tons, almost all destined for Lebanon and other Arab countries. Exports consist almost entirely of "green" inshell pistachios, which are shipped during the production season. Syria does not export any shelled pistachios.

Syrian law prohibits the import of inshell pistachios. However, some quantities are smuggled into the country from Turkey and Iran via Lebanon. Imports of shelled pistachios are allowed, though some smuggling of this product occurs as well. Syria's shelled pistachio imports for 1993/94 are forecast at 2,000 tons, inshell basis, unchanged from last year.

Turkey

Pistachio production for 1993/94 is forecast at a record 50,000 tons, more than double last year's frost-reduced crop and 11 percent above the previous record set in 1991/92. The bumper crop is attributed to a 5-percent increase in the number of bearing trees, generally favorable weather in southeastern Turkey where the bulk of the pistachios are grown, and the fact that 1993/94 is an "on-year" in the alternate bearing cycle.

Most pistachios grown in Turkey are thinner and smaller than the Iranian varieties, but are considered by some to have better flavor. In recent years, Turkish farmers have begun cultivating a pistachio variety named Siirt which, except for being oval rather than round, is similar to the Iranian types. Siirt pistachios are bigger and bring a higher price on the domestic market. They reportedly now constitute 10 to 15 percent of Turkey's annual crop.

In August, the Government of Turkey set the 1993/94 support price for inshell red peel

pistachios at 40,000 Turkish Lira (TL) per kilogram. The 1992/93 support price was TL 25,000. However, despite the 60-percent increase, the support price did not keep pace with inflation as measured by the consumer price index, which rose 73 percent in the July 1992-August 1993 period.

Depending upon the supply and demand situation and Turkey's overall economic situation, the effect of the support price on the Turkish pistachio market will vary. In years when supplies are tight, demand pushes prices above the support price, minimizing its effect. In general, demand for pistachios in Turkey is on the rise, due to increases in population, per capita income and production. In addition, Turkey's high inflation rate erodes the value of the support price over the course of the year, lessening the impact of the support price on the pistachio market.

United States

While an official USDA estimate will not be available until January 20, 1994, the California Pistachio Commission reports that 1993/94 pistachio deliveries through October 31 totaled about 67,950 tons, slightly higher than last year.

The production rise in an off-year is reportedly due largely to the increasing yields of younger trees as they mature.

U.S. pistachio exports set a record in 1992/93, expanding 23 percent over 1991/92 to 23,497 tons. Exports are forecast to continue to grow in 1993/94, as newer markets such as Mexico and Germany develop. Iranian pistachios are the main competition for U.S. product in most major markets.

In Asia, U.S. pistachios are becoming a common sight in stores in southern China, where the U.S. industry is initiating promotional activities. Inshell pistachio exports to China surged past the 3,000 ton mark in 1992/93, and more U.S. pistachios entered China via Hong Kong. Some U.S. exports of inshell nuts to China, both direct and via Hong Kong, are re-imported into the United States after their shells are split.

(Katie Nishiura, 202-720-0911)

PISTACHIOS: PRODUCTION, SUPPLY & DISTRIBUTION
IN SELECTED COUNTRIES 1/
(Metric Tons, Inshell Basis)

Country/ Year 2/	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks	TOTAL DISTRIBUTION
Greece								
1991/92	2,070	2,300	1,600	5,970	50	3,800	2,120	5,970
1992/93	2,120	4,565	1,500	8,185	196	4,800	3,189	8,185
1993/94	3,189	4,100	1,300	8,589	250	4,870	3,469	8,589
Italy								
1991/92	400	3,000	8,418	11,818	1,594	8,224	2,000	11,818
1992/93	2,000	300	9,000	11,300	2,000	8,850	450	11,300
1993/94	450	4,000	9,500	13,950	2,000	9,000	2,950	13,950
Syria								
1991/92	900	14,400	2,000	17,300	2,500	14,000	800	17,300
1992/93	800	20,000	2,000	22,800	3,000	17,000	2,800	22,800
1993/94	2,800	22,000	2,000	26,800	4,000	20,000	2,800	26,800
Turkey								
1991/92	5,000	45,000	100	50,100	1,903	28,197	20,000	50,100
1992/93	20,000	20,000	500	40,500	1,500	32,000	7,000	40,500
1993/94	7,000	50,000	200	57,200	2,200	34,000	21,000	57,200
United States 3/								
1991/92	21,831	34,930	330	57,091	22,382	26,446	8,263	57,091
1992/93	8,263	66,678	440	75,381	27,497	29,996	17,888	75,381
1993/94	17,888	67,950	440	86,278	31,500	29,778	25,000	86,278
TOTAL								
1991/92	30,201	99,630	12,448	142,279	28,429	80,667	33,183	142,279
1992/93	33,183	111,543	13,440	158,166	34,193	92,646	31,327	158,166
1993/94	31,327	148,050	13,440	192,817	39,950	97,648	55,219	192,817

1/Data unavailable for Iran, the world's largest producing country.

2/Marketing Years: September-August for Italy, Syria, the United States; October-September for Greece and Turkey.

3/U.S. 1993/94 Production forecast based on: Pistachios delivered through October 31, 1993, according to the California Pistachio Commission.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
CANADA		16,792	8,936	23,933	16,546	113,733	12,099	6,967	16,741	11,791	75,230
MEXICO		931	972	11,978	17,896	99,364	460	694	5,418	9,752	49,551
CANADA		9,375	8,070	19,972	17,383	83,089	6,666	6,023	16,776	13,761	55,311
HONG KONG		4,182	9,185	9,102	11,309	47,234	2,490	3,668	6,463	7,786	27,966
OTHER		7,192	9,378	19,130	19,809	145,925	4,908	5,864	14,461	12,711	92,820
Subtotal:-----		38,471	33,201	84,714	83,176	489,346	26,622	23,216	58,859	55,301	300,700
FR. PEARS(JUL)	MT										
CANADA		4,457	5,206	12,740	12,197	34,899	2,812	3,179	8,129	7,907	25,100
MEXICO		3,525	4,460	7,656	8,723	34,222	1,682	2,323	3,565	4,576	17,370
TAIWAN		299	269	330	269	6,157	232	194	269	194	4,145
SWEDEN		141	0	141	43	5,790	56	0	1,985	621	2,657
OTHER		1,798	772	2,828	919	19,289	1,288	526	1,985	621	11,673
Subtotal:-----		10,220	10,707	23,694	22,152	100,358	6,071	6,223	14,005	13,319	60,944
APRICOTS(MAY)	MT										
CANADA		11	44	3,001	2,955	3,091	18	48	3,383	3,943	3,508
MEXICO		13	659	479	1,469	497	8	505	370	1,153	394
EC 12		0	0	463	309	0	0	0	1,749	983	1,263
UNITED KINGDOM		0	0	425	224	426	0	0	1,114	748	1,118
OTHER		16	33	374	259	440	26	72	509	393	630
Subtotal:-----		39	735	4,316	4,992	4,492	52	625	5,521	6,439	5,794
FR. CHERRIES(MAY)	MT										
JAPAN		0	4	12,144	12,420	12,162	0	16	61,981	77,240	61,991
CANADA		0	13	9,520	6,172	9,607	0	14	17,896	13,235	18,106
EC 12		78	8	2,187	1,899	3,521	341	7	10,804	6,901	11,520
UNITED KINGDOM		19	0	6,634	1,240	2,464	85	7	8,726	7,386	7,226
HONG KONG		0	0	2,535	1,816	2,553	0	0	5,633	5,494	5,643
TAIWAN		0	88	2,063	2,121	2,082	0	117	4,186	4,675	4,211
OTHER		18	22	1,011	780	1,073	13	30	3,252	2,610	3,381
Subtotal:-----		96	136	30,460	25,209	30,998	354	185	103,753	110,154	104,852
PEACH-NECTRN(MAY)	MT										
CANADA		2,266	5,111	49,718	46,282	51,461	2,215	3,915	41,755	42,815	44,175
MEXICO		3,073	2,606	7,219	5,700	8,953	1,887	1,527	3,731	3,067	4,857
TAIWAN		457	679	5,418	4,116	5,776	347	1,738	6,739	7,209	5,142
OTHER		337	756	3,472	4,042	3,773	311	469	3,135	3,566	3,400
Subtotal:-----		6,131	9,151	65,827	60,140	69,686	4,760	6,649	53,760	53,658	57,610
PLUM-PRUNES(MAY)	MT										
CANADA		2,841	3,378	23,650	21,751	25,485	2,045	2,426	18,842	21,668	20,756
TAIWAN		3,188	2,422	11,007	13,714	21,848	2,269	2,128	14,433	12,186	15,071
HONG KONG		964	635	8,043	7,858	8,470	755	486	6,674	6,609	6,609
EC 12		551	510	4,178	1,375	5,771	483	347	3,323	1,477	4,574
UNITED KINGDOM		510	1,511	6,509	1,505	5,458	347	370	6,113	4,772	4,772
OTHER		1,190	2,498	5,084	6,532	6,115	914	1,744	4,023	4,995	4,845
Subtotal:-----		8,734	9,443	61,961	51,231	67,689	6,465	7,131	46,734	47,000	51,855
FR. AVOCADOS(OCT)	MT										
CANADA		167	492	3,608	5,165	3,608	243	515	4,281	4,492	4,281
JAPAN		0	72	2,203	3,234	2,203	0	86	3,334	3,387	3,334
EC 12		17	13	1,059	5,269	1,059	67	30	1,624	5,644	1,624
FRANCE		0	2	514	2,832	514	0	9	6,355	2,734	6,355
UNITED KINGDOM		0	0	418	1,854	418	0	3	663	2,086	663
OTHER		18	15	75	517	75	32	19	121	701	121
Subtotal:-----		201	592	6,946	14,186	6,946	341	651	9,360	14,224	9,360
FR. KIWI FRUIT(OCT)	MT										
CANADA		19	60	3,263	3,387	3,263	32	85	5,752	4,298	5,752
JAPAN		0	0	4,498	2,49	1,498	0	0	3,142	4,24	3,142
TAIWAN		0	0	1,421	3,554	1,421	0	0	3,341	5,702	3,341
KOREA, REPUBLIC		0	2	503	538	503	0	6	1,040	798	1,040
MEXICO		0	0	412	281	412	0	0	378	193	378
OTHER		0	0	386	350	386	0	0	731	657	731
Subtotal:-----		19	62	7,485	8,359	7,485	32	91	14,386	12,071	14,386
FRESH GRAPES (MAY)	MT										
CANADA		33,729	36,724	72,367	70,889	104,410	26,460	32,237	67,586	78,576	103,958
HONG KONG		5,015	5,451	12,261	10,907	19,431	5,214	5,218	12,843	11,133	27,566
TAIWAN		4,500	5,654	7,488	8,176	14,944	4,678	5,167	8,054	10,631	16,199
OTHER		6,442	7,970	21,656	21,423	48,367	8,042	9,821	30,814	29,492	62,401
Subtotal:-----		49,686	55,799	113,773	111,395	187,152	44,393	54,443	119,297	130,362	204,124
FR. STRAWBERRIES(JAN)	MT										
CANADA		1,767	2,242	33,200	32,998	35,539	2,948	2,895	45,525	44,249	50,006
EC 12		678	318	3,403	1,749	3,961	2,017	624	9,955	3,591	11,593
JAPAN		887	786	2,480	2,544	3,578	4,772	4,480	12,210	12,992	18,357
UNITED KINGDOM		364	253	2,173	3,320	2,499	1,007	42	6,137	2,618	7,040
OTHER		385	947	2,848	3,669	3,309	380	584	4,215	3,755	4,776
Subtotal:-----		3,717	4,292	41,930	40,959	46,386	10,117	8,584	71,906	64,588	84,731
FR. ORNG INC TMPL(NOV)	MT										
CANADA		8,410	4,538	161,137	201,985	170,992	3,387	3,274	78,059	97,659	82,750
JAPAN		6,201	6,484	161,484	159,132	166,414	6,332	6,154	97,329	97,329	97,329
HONG KONG		6,978	8,761	87,446	121,302	97,028	3,347	4,473	47,440	57,480	51,737
OTHER		1,648	1,783	59,753	58,479	60,982	881	1,155	33,426	29,274	34,116
Subtotal:-----		23,689	21,891	472,820	540,201	495,215	11,246	14,422	255,384	268,922	265,966
FR. GRPEPT(SEP)	MT										
JAPAN		1,391	3,158	1,391	3,158	222,775	814	1,612	814	1,612	108,744
EC 12		349	601	349	601	116,865	204	294	204	294	61,288
CANADA		2,221	3,480	2,221	3,480	69,444	1,164	2,028	1,164	2,028	34,612
FRANCE		202	202	202	202	1,450	103	107	107	107	25,144
NETHERLANDS		111	337	111	337	29,021	73	155	73	155	14,005
OTHER		120	607	120	607	31,919	63	349	63	349	15,609

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY			QUANTITY						VALUE (1,000 DOLLARS)							
COUNTRY REGION			CURR LAST	MO YR	CURR LAST	MO YR	YR TDT LAST	YR TDT CURR YR	LAST YEAR	CURR LAST	MO YR	CURR LAST	MO YR	YR TDT LAST	YR TDT CURR YR	LAST YEAR
FRESH FRUIT																
FR GRPFR (SEP)			MT													
Subtotal:-----			4,082	7,846			4,082	7,846	441,003	2,246	4,284			2,246	4,284	220,253
FR TANGERINES (NOV)			MT													
CANADA			0	0			9,137	8,309	9,558	0	0			8,808	7,247	9,232
EC 12			0	0			2,059	648	2,059	0	0			1,958	506	1,958
UNITED KINGDOM			0	0			1,051	173	1,051	0	0			1,129	135	1,129
NETHERLANDS			0	0			627	280	627	0	0			515	219	515
OTHER			0	0			328	180	328	0	0			765	254	765
Subtotal:-----			0	0			11,525	9,137	11,946	0	0			11,532	8,008	11,956
CANNED FRUIT																
CND PEACH&NECT (JUN)			MT													
CANADA			648	601			1,212	1,923	5,812	707	669			1,330	2,181	6,391
JAPAN			249	236			625	913	2,691	308	286			772	1,035	3,212
TAIWAN			222	226			1,123	933	2,460	175	199			952	819	2,106
MEXICO			92	137			343	426	1,775	69	104			265	319	1,421
HONG KONG			147	236			686	782	4,667	75	221			331	724	804
OTHER			342	503			1,272	1,860	5,611	306	473			1,118	1,684	5,033
Subtotal:-----			1,700	1,940			5,262	6,837	19,815	1,640	1,952			4,768	6,762	18,967
CND PEARS (JUN)			MT													
CANADA			127	170			430	444	1,508	149	147			461	447	1,579
EC 12			3	2			472	16	709	4	3			558	17	886
JAPAN			37	86			78	131	506	46	92			82	154	555
UNITED KINGDOM			0	0			295	0	466	0	0			403	0	662
MEXICO			0	31			33	113	321	0	27			28	110	310
OTHER			66	22			303	144	861	67	22			244	126	740
Subtotal:-----			234	311			1,316	848	3,905	266	291			1,373	854	4,071
CND PNEAPL (JAN)			MT													
JAPAN			239	151			2,340	945	2,742	204	135			1,807	892	2,237
CANADA			154	31			1,540	981	2,099	126	37			1,353	977	1,813
MEXICO			81	77			469	440	618	70	60			399	362	527
EC 12			2	13			397	330	488	3	12			352	300	447
OTHER			30	12			304	292	410	31	13			273	198	362
Subtotal:-----			505	283			5,050	2,988	6,357	433	257			4,184	2,729	5,386
FRT MIXTURES (JUN)			MT													
CANADA			576	0			1,786	0	3,583	843	0			2,611	0	4,912
PHILIPPINES			220	0			693	0	2,872	270	0			761	0	2,969
HONG KONG			372	0			1,456	0	2,326	277	0			1,059	0	1,632
SAUDI ARABIA			1,215	0			1,267	0	2,279	560	0			597	0	1,603
JAPAN			377	0			1,173	0	2,031	498	0			1,326	0	2,336
SINGAPORE			301	0			721	0	942	260	0			412	0	1,978
OTHER			1,145	0			3,267	0	7,102	906	0			3,120	0	6,954
Subtotal:-----			4,205	0			10,364	0	22,136	3,613	0			10,195	0	22,383
DRIED FRUIT																
DRD RAISINS (AUG)			MT													
EC 12			6,019	5,263			13,555	11,995	56,420	8,617	7,774			17,905	18,446	76,224
UNITED KINGDOM			2,850	2,513			6,780	6,003	25,585	4,063	3,844			8,992	9,895	35,568
JAPAN			2,624	2,462			4,729	4,689	23,290	3,500	3,673			6,207	6,963	31,573
GERMANY			1,552	1,062			3,131	2,751	13,256	2,227	1,408			4,146	3,834	17,158
CANADA			1,764	1,136			3,003	2,322	10,832	3,516	2,750			6,176	5,377	22,715
DENMARK			6,333	858			1,788	1,636	7,205	819	1,215			2,143	2,216	8,998
OTHER			5,203	4,042			9,247	7,261	35,256	6,409	6,467			11,326	11,525	49,675
Subtotal:-----			15,610	12,902			30,534	26,266	125,798	22,042	20,664			41,614	42,312	180,188
DRD PRUNES (AUG)			MT													
EC 12			3,695	2,609			8,088	6,052	48,625	5,134	5,686			11,261	12,946	69,456
GERMANY			811	505			1,967	1,613	17,419	1,125	1,191			2,492	3,639	21,920
JAPAN			1,450	1,281			2,592	2,160	15,311	2,274	2,624			4,064	4,472	25,915
ITALY			1,141	868			2,374	1,712	11,874	1,937	2,222			4,280	4,296	20,608
UNITED KINGDOM			596	477			1,003	1,021	7,498	774	655			1,248	1,391	9,401
CANADA			358	577			754	1,142	5,052	771	1,298			1,643	2,450	10,820
OTHER			2,387	1,345			4,218	3,125	18,937	3,344	2,580			5,949	6,199	28,288
Subtotal:-----			7,890	5,812			15,653	12,481	87,925	11,523	12,188			22,917	26,066	134,380
FRUIT JUICES (SSE)																
ORANGE JU CNC (DEC)			KL													
CANADA			12,236	5,147			116,640	92,359	134,664	5,526	2,362			51,789	41,440	59,896
EC 12			5,104	8,456			49,702	96,517	59,747	1,739	3,785			18,770	37,150	22,463
JAPAN			2,296	1,696			55,020	34,943	58,911	929	677			25,820	13,935	27,359
FRANCE			3,056	2,610			22,537	36,083	28,821	937	1,234			8,120	15,580	10,487
KOREA, REPUBLIC			595	3,149			17,689	28,025	20,070	295	1,260			9,044	11,558	8,223
OTHER			4,954	6,204			49,319	54,159	58,858	2,007	2,103			20,464	18,511	24,095
Subtotal:-----			25,185	24,653			288,369	306,003	332,249	10,495	10,187			125,892	122,594	144,036
ORNG JU NTCNC (DEC)			KL													
EC 12			2,547	1,328			26,581	20,792	32,366	1,966	852			19,225	13,664	23,181
JAPAN			4,776	3,666			38,423	28,423	25,131	1,739	3,785			3,125	2,503	2,893
FRANCE			1,334	356			10,000	7,666	22,387	1,419	276			14,381	5,284	16,005
UNITED KINGDOM			590	452			5,654	7,343	9,038	338	248			4,216	2,611	6,543
JAPAN			213	56			4,111	3,192	4,571	191	72			3,179	2,189	3,516
OTHER			1,113	1,457			10,222	14,195	13,320	898	1,095			8,122	12,470	10,540
Subtotal:-----			6,875	7,614			59,633	76,601	75,361	5,562	5,144			52,032	56,649	64,130
GRPFR JU CNC (DEC)			KL													
JAPAN			2,140	1,363			27,464	26,540	30,946	1,503	956			19,400	17,886	21,895
EC 12			867	1,169			13,988	18,792	15,201	426	585			6,112	8,663	6,701
FRANCE			358	364			10,000	7,666	10,713	695	276			6,582	4,717	7,557
UNITED KINGDOM			274	118			5,351	7,261	5,605	197	89			2,230	3,531	2,337
JAPAN			285	31			4,339	3,691	4,866	98	16			1,777	1,305	2,044
OTHER			190	220			1,669	2,110	1,982	111	90			908	1,205	1,118
Subtotal:-----			4,155	3,136			52,208	53,993	58,902	2,730	1,907			32,961	32,471	37,471

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY	REGION	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR ASPARAGUS(OCT) MT											
CANADA		95	109	9,031	9,868	9,031	271	295	18,496	21,592	18,496
JAPAN		27	102	5,964	7,438	5,964	161	603	23,608	29,584	23,685
SWITZERLAND		0	1	2,036	1,798	2,036	0	5	6,022	4,985	6,022
EC 12		6	8	1,889	1,866	1,889	26	25	5,670	5,507	5,670
OTHER		5	2	199	264	199	29	4	710	846	710
Subtotal:-----		133	221	19,119	21,289	19,119	488	932	54,583	62,514	54,583
FR ONIONS(OCT) MT											
CANADA		5,266	5,583	100,916	117,151	100,916	1,742	1,819	40,009	47,955	40,009
MEXICO		11,108	3,471	20,848	21,278	20,848	3,187	1,025	6,095	6,759	6,095
JAPAN		39	7,609	20,707	28,107	20,707	8	2,658	4,428	9,444	4,428
OTHER		2,644	3,542	14,187	16,469	14,187	956	1,425	5,231	8,083	5,231
Subtotal:-----		19,057	20,206	156,658	183,006	156,658	5,892	6,927	55,764	71,841	55,764
CANNED VEGETABLES											
CND SWT CORN(AUG) MT											
EC 12		3,095	3,747	7,277	8,474	55,436	2,328	2,634	5,593	5,856	39,589
JAPAN		4,033	5,540	6,081	8,695	50,125	3,169	4,321	5,084	6,871	39,778
UNITED KINGDOM		1,276	808	3,163	2,079	21,814	950	546	2,476	1,453	15,301
GERMANY		1,054	1,380	8,866	2,702	17,723	801	1,394	1,984	1,948	12,902
TAIWAN		1,203	1,054	2,398	5,335	17,512	1,119	836	2,273	2,024	15,497
HONG KONG		1,178	1,421	2,261	2,434	15,846	582	1,167	1,149	1,959	8,313
OTHER		2,071	3,413	4,257	4,893	33,205	1,584	2,788	3,297	4,030	25,641
Subtotal:-----		11,580	15,144	22,274	27,032	172,124	8,783	11,746	17,396	20,738	128,818
CND TOM PAS(JUL) MT											
CANADA		4,749	4,699	12,883	12,972	46,004	3,718	4,161	11,046	11,833	38,098
KOREA, REPUBLIC		887	314	1,430	545	4,638	738	261	1,174	433	3,875
JAPAN		108	1,120	441	2,634	3,835	988	847	1,868	2,842	2,842
PHILIPPINES		393	786	737	790	3,517	269	565	504	573	7,134
OTHER		384	3,307	1,207	6,184	8,816	285	2,426	972	4,720	7,157
Subtotal:-----		6,521	10,225	16,698	23,125	66,811	5,087	8,261	14,018	19,427	54,406
CND TOM SAUCE(JUL) MT											
CANADA		3,513	3,282	10,660	11,276	46,201	3,738	3,229	10,982	11,147	45,466
MEXICO		669	577	1,317	1,484	6,169	422	367	830	948	3,913
JAPAN		610	778	1,418	1,660	5,500	485	688	1,182	1,524	4,941
OTHER		932	933	3,988	2,428	11,559	953	1,031	3,687	2,662	11,773
Subtotal:-----		5,724	5,571	17,384	16,848	69,428	5,599	5,314	16,681	16,282	66,093
FRZN VEGETABLES											
FZN SWT CORN(JUL) MT											
JAPAN		2,830	3,967	7,966	9,939	35,306	2,375	3,369	6,787	8,502	30,277
AUSTRALIA		6,288	3,958	1,472	4,210	13,593	1,484	1,049	1,166	1,733	4,150
HONG KONG		521	435	1,149	1,073	4,516	364	339	848	766	3,163
MEXICO		456	331	779	522	3,366	286	197	500	317	2,114
CANADA		358	224	390	390	3,041	244	154	558	666	2,133
OTHER		365	543	1,544	1,630	8,026	314	449	1,210	1,365	6,687
Subtotal:-----		4,987	6,082	13,733	16,087	59,754	3,941	4,992	10,958	12,948	48,538
FZN F FRY(JUL) MT											
JAPAN		10,103	9,895	30,240	31,983	123,736	7,133	6,908	20,859	22,380	86,084
KOREA, REPUBLIC		301	445	1,017	746	1,049	738	1,049	2,426	2,746	1,049
HONG KONG		742	850	2,560	1,647	11,260	459	519	1,651	1,846	7,107
OTHER		4,041	5,592	12,695	18,045	53,587	2,897	4,045	9,225	12,946	40,111
Subtotal:-----		15,948	17,920	48,239	57,084	202,543	11,471	12,521	34,162	39,918	143,678
TREE NUTS											
ALMONDS UNSH(JUL) MT											
INDIA		652	673	1,901	1,972	8,926	1,139	1,824	3,040	5,285	14,037
JAPAN		301	445	1,017	746	3,905	1,022	720	3,101	1,339	11,168
EC 12		194	305	451	381	1,108	337	553	632	715	1,832
OTHER		226	211	511	345	2,374	602	434	1,186	730	5,626
Subtotal:-----		1,373	1,634	3,879	3,445	16,313	3,100	3,532	7,960	8,069	32,664
ALMND SH/PREP(JUL) MT											
EC 12		12,567	7,974	28,161	22,106	95,640	39,506	33,363	89,805	85,613	316,044
GERMANY		6,288	3,958	1,472	4,210	13,593	1,484	1,049	1,166	1,733	4,150
JAPAN		1,705	1,069	4,339	3,833	19,947	6,271	5,070	16,180	15,826	74,887
UNITED KINGDOM		1,763	1,239	3,810	3,106	12,584	5,574	4,529	12,376	11,266	40,895
NETHERLANDS		1,500	689	4,098	2,316	12,274	5,263	3,136	14,549	9,640	44,608
CANADA		1,064	1,185	2,482	2,654	9,996	3,808	4,682	8,696	10,268	34,463
OTHER		5,606	4,722	10,157	9,544	42,887	18,284	20,373	32,895	37,223	139,537
Subtotal:-----		20,942	14,950	45,140	38,137	168,469	67,869	63,487	147,575	148,930	564,432
WALNUTS SH(AUG) MT											
EC 12		1,380	229	1,661	470	8,339	3,199	648	3,852	1,199	20,982
JAPAN		277	333	470	459	3,843	1,148	1,693	1,996	2,379	15,726
GERMANY		1,048	136	1,286	339	3,280	2,069	429	2,546	922	7,106
CANADA		184	141	406	205	2,353	693	663	1,535	894	9,456
SPAIN		46	90	66	90	1,807	121	203	201	203	4,833
ITALY		3	2	3	2	1,013	18	11	18	11	2,074
OTHER		470	270	624	376	4,023	1,303	1,390	1,664	1,616	14,533
Subtotal:-----		2,311	972	3,160	1,511	18,558	6,343	4,394	9,048	6,087	61,696
WALNUTS UNSH(AUG) MT											
EC 12		6,253	2,233	6,289	2,267	30,827	12,897	4,553	12,970	4,635	61,544
SPAIN		931	418	931	418	9,993	1,907	866	1,907	866	19,606
GERMANY		1,976	511	1,976	511	6,675	3,987	932	3,987	932	13,521
NETHERLANDS		1,825	1,100	1,825	1,100	5,551	3,802	2,328	3,802	2,328	11,635
ITALY		478	189	478	189	4,501	983	392	983	392	8,853
OTHER		507	650	988	963	6,371	1,168	1,657	1,969	2,335	13,918
Subtotal:-----		6,760	2,883	7,276	3,230	37,199	14,065	6,210	14,940	6,970	75,463
HOPS/PRODUCTS											
HOP PELTS(SEP) MT											
BRAZIL		157	250	157	250	1,369	607	1,274	607	1,274	6,191
CANADA		41	46	41	46	1,041	258	323	258	323	7,124

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)							
COUNTRY	REGION	CURR LAST	MO YR	CURR MO	YR LAST	TDT LAST	TDT CURR	LAST YEAR	CURR LAST	MO YR	CURR MO	YR LAST	TDT LAST	TDT CURR	LAST YEAR
HOPS&PRODUCTS															
HOP BELTS(SEP)	MT														
EC 12		0		0		0		724		0		0		0	4,588
MEXICO		67		0		67		483		414		0		414	3,291
COLOMBIA		0		0		0		443		0		0		0	3,510
GERMANY		0		0		0		335		0		0		0	1,819
OTHER		32		6		32		1,053		115		40		115	5,984
Subtotal:-----		298		301		298		5,113		1,394		1,638		1,394	30,688
HOP EXTRACT(SEP)															
EC 12	MT	32		67		32		1,458		468		610		468	24,964
GERMANY		13		46		13		710		95		343		95	11,849
MEXICO		0		0		0		706		0		0		0	12,127
BRAZIL		12		63		12		402		182		923		182	3,040
NETHERLANDS		0		0		0		278		0		0		0	5,119
KOREA, REPUBLIC		0		1		0		258		0		19		0	2,668
OTHER		47		79		47		1,081		382		1,163		382	22,356
Subtotal:-----		89		211		89		3,905		1,032		2,715		1,032	65,154
HOPS, NSPF (SEP)															
EC 12	MT	94		25		94		2,073		423		137		423	10,842
GERMANY		49		0		49		1,662		149		0		149	8,379
UNITED KINGDOM		45		25		45		305		274		137		274	1,856
JAPAN		1		1		1		206		4		6		4	1,149
OTHER		30		8		30		333		343		53		343	4,091
Subtotal:-----		125		34		125		2,612		770		196		770	16,082
WINE															
GRAPE WINE(JAN)	KL														
EC 12		4,232		4,031		32,315		37,395		41,289		6,204		5,543	62,260
CANADA		2,215		2,698		25,595		24,721		34,117		3,652		4,418	43,469
UNITED KINGDOM		2,570		2,771		18,122		19,729		23,432		4,085		3,811	36,943
JAPAN		1,519		1,255		14,066		8,976		17,760		1,992		1,688	23,566
OTHER		1,978		2,593		20,043		18,182		27,265		2,892		3,305	36,098
Subtotal:-----		9,944		10,577		92,018		89,274		120,432		14,740		14,954	165,394

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
COUNTRY	REGION	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR		
FR FRUIT & NUTS													
FR APPLES(JUL)	MT												
NEW ZEALAND		0	124	284	2,296	28,513	0	168	333	2,674	30,602		
CANADA		3,974	3,899	5,541	7,585	46,611	1,671	1,429	2,650	2,731	16,772		
OTHER		68	401	5,052	10,365	35,277	43	233	3,022	5,947	18,006		
Subtotal:-----		4,042	4,423	10,877	20,246	110,401	1,715	1,830	6,005	11,352	65,380		
FR PEARS(JUL)													
CHILE	MT	0	0	0	143	44,689	0	0	0	43	14,858		
ARGENTINA		0	0	0	0	14,604	0	0	0	0	9,230		
OTHER		266	199	289	199	5,479	806	550	821	550	8,178		
Subtotal:-----		266	199	289	342	64,772	806	550	821	593	32,266		
APRICOT (MAY)													
CHILE	MT	0	0	0	0	699	0	0	0	0	441		
NEW ZEALAND		0	0	0	0	158	0	0	0	0	405		
OTHER		0	0	2	46	55	0	0	4	59	132		
Subtotal:-----		0	0	2	46	911	0	0	4	59	978		
PEACH-NEC(MAY)													
CHILE	MT	0	0	0	0	40,869	0	0	0	0	25,810		
OTHER		467	98	794	214	1,088	335	73	579	182	997		
Subtotal:-----		467	98	794	214	41,956	335	73	579	182	26,807		
PLUM-PRUNE(MAY)													
CHILE	MT	0	0	380	10	23,893	0	0	228	13	15,116		
OTHER		36	6	46	64	98	20	6	39	59	80		
Subtotal:-----		36	6	427	74	23,990	20	6	267	72	15,196		
FRESH GRAPES (MAY)													
CHILE	MT	0	0	4,948	2,089	284,846	0	0	3,059	1,583	207,103		
MEXICO		0	0	37,056	41,305	37,056	0	0	67,144	55,211	67,144		
OTHER		481	301	481	302	2,023	154	87	154	89	854		
Subtotal:-----		481	301	42,485	43,695	323,924	154	87	70,357	56,883	275,101		
FR RASPBRY(JAN)													
CANADA	MT	1	19	6,260	5,091	6,261	3	58	7,452	9,229	7,460		
OTHER		1	19	5,100	5,608	6,881	5	60	8,425	10,027	8,612		
Subtotal:-----		1	19	6,770	5,608	6,881	5	60	8,425	10,027	8,612		
FR STRAWBRIS(JAN)													
MEXICO	MT	4	0	8,006	11,875	9,238	3	0	9,440	16,683	11,127		
OTHER		1	5	473	278	1,558	6	19	713	524	3,979		
Subtotal:-----		5	5	8,479	12,153	10,797	9	19	10,154	17,207	15,106		
FR BANANA(JAN)													
COSTA RICA	MT	77,242	84,693	716,676	715,166	954,484	23,946	24,213	210,892	213,747	280,981		
ECUADOR		58,537	56,485	694,451	585,923	896,248	17,310	14,658	200,336	161,125	258,793		
OTHER		139,166	155,909	1,230,503	1,345,902	1,680,494	40,725	43,730	366,686	385,751	482,305		
Subtotal:-----		274,945	297,087	2,641,631	2,646,991	3,531,226	81,981	82,601	777,914	760,622	1,022,079		
FR MANGO(JAN)													
MEXICO	MT	2,104	2,898	68,223	94,439	68,255	1,780	2,004	62,764	71,626	62,815		
OTHER		15	202	5,092	13,094	8,125	55	511	5,701	10,828	8,672		
Subtotal:-----		2,119	3,100	73,314	107,533	76,380	1,835	2,515	68,464	82,454	71,487		
FR PINAPPLE(JAN)													
COSTA RICA	MT	4,598	5,555	45,057	55,807	58,169	2,235	2,345	21,018	24,380	27,337		
HONDURAS		2,218	2,260	23,704	20,026	31,369	896	609	8,395	5,654	8,830		
OTHER		1,229	1,532	25,701	21,248	32,020	334	480	5,818	5,693	7,476		
Subtotal:-----		8,045	9,327	94,462	97,081	121,559	3,165	3,434	33,231	35,727	43,643		

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN

COMMODITY AND COUNTRY		MARKETING YEAR BEGINNING AS INDICATED						VALUE (1,000 DOLLARS)					
		QUANTITY			VALUE			QUANTITY			VALUE		
COUNTRY REGION		CURR LAST YR	MO CURR YR	YR TDT LAST YR	CURR LAST YR	MO CURR YR	YR TDT LAST YR	CURR LAST YR	MO CURR YR	YR TDT LAST YR	CURR LAST YR	MO CURR YR	YR TDT LAST YR
FR CANTLEPE(MAY)	MT												
MEXICO		0	0	45,870	19,591	104,864	0	0	13,489	5,004	29,666		
COSTA RICA		0	0	1,731	3,288	35,094	0	0	991	1,961	19,796		
HONDURAS		0	0	5,120	4,316	45,437	0	0	1,183	1,074	14,510		
OTHER		8	0	5,373	3,060	45,451	4	0	1,236	991	11,533		
Subtotal:-----		8	0	58,094	30,255	240,846	4	0	16,899	9,030	75,505		
FR MELON,OT(MAY)	MT												
MEXICO		25	0	17,950	12,842	51,787	11	0	5,830	3,851	17,944		
COSTA RICA		0	0	896	871	24,845	0	0	481	314	11,269		
OTHER		42	45	3,905	1,649	45,268	16	20	1,118	584	14,826		
Subtotal:-----		67	45	22,751	15,362	121,899	27	20	7,437	4,749	44,039		
FR ORANGES(NOV)	MT												
MOROCCO		0	0	4,504	0	4,504	0	0	3,033	0	3,033		
AUSTRALIA		0	1,161	2,517	4,555	2,517	0	1,596	1,256	6,265	1,256		
MEXICO		0	0	2,619	1,237	2,619	0	0	1,207	483	1,207		
OTHER		677	319	5,933	4,230	5,989	140	95	1,853	1,449	1,886		
Subtotal:-----		677	1,480	15,472	10,082	15,629	140	1,692	7,351	8,197	7,388		
CANNED FRUIT													
CND MANDRN(JAN)	MT												
EC 12		1,267	821	32,173	16,718	35,376	1,775	722	42,039	15,959	45,761		
SPAIN		1,267	821	32,173	16,718	35,376	1,775	722	42,039	15,959	45,761		
CHINA, PEOPLES R		1,811	1,606	19,906	14,185	24,236	1,781	1,356	20,053	12,025	23,981		
OTHER		207	46	2,218	915	2,473	181	44	2,920	1,102	3,219		
Subtotal:-----		3,286	2,474	54,297	31,819	62,085	3,738	2,122	65,012	29,086	72,961		
CND BLK OLV(NOV)	MT												
EC 12		582	705	12,600	11,137	13,372	1,311	1,362	26,991	22,919	28,810		
SPAIN		466	621	10,912	9,352	11,550	1,030	1,123	22,455	18,343	23,860		
MOROCCO		206	12	3,397	2,449	3,799	363	20	5,658	4,374	6,303		
OTHER		13	2	219	119	234	24	3	479	219	505		
Subtotal:-----		800	720	16,216	13,705	17,405	1,698	1,385	33,128	27,513	35,618		
CND GRN OLV(NOV)	MT												
EC 12		3,244	2,934	34,012	36,544	38,529	8,953	7,081	86,771	92,775	100,411		
SPAIN		3,211	2,845	33,431	35,609	37,826	8,842	6,933	85,426	90,944	98,840		
OTHER		186	104	1,438	1,910	1,623	285	192	2,651	3,101	2,867		
Subtotal:-----		3,430	3,039	35,450	38,454	40,152	9,238	7,273	89,422	95,876	103,279		
CND PEACH(JUN)	MT												
EC 12		1,965	1,318	2,643	4,477	20,053	1,334	757	1,716	2,640	13,745		
GREECE		1,909	1,311	2,565	4,420	19,021	1,278	736	1,638	2,568	12,996		
OTHER		219	312	1,431	688	1,858	114	169	1,053	395	1,363		
Subtotal:-----		2,184	1,629	4,075	5,165	21,921	1,448	925	2,769	3,035	15,109		
CND PINAPLE(JAN)	MT												
THAILAND		10,277	11,959	146,324	140,201	174,077	6,296	5,982	99,645	85,684	117,327		
PHILIPPINES		8,820	11,197	92,602	97,418	128,163	6,013	7,417	62,019	67,428	85,738		
OTHER		2,757	2,373	26,508	32,007	37,713	1,133	1,399	13,999	13,242	22,442		
Subtotal:-----		21,855	25,529	265,734	269,627	340,973	14,080	14,532	178,664	166,254	225,306		
DRIED FRUIT													
DRD APRCT(JUL)	MT												
TURKEY		746	653	1,095	1,648	10,217	1,774	1,644	2,653	3,992	23,134		
OTHER		36	41	60	44	299	173	64	146	80	729		
Subtotal:-----		781	693	1,155	1,692	10,516	1,847	1,708	2,799	4,072	23,863		
DATES(SEP)	MT												
PAKISTAN		68	53	68	53	3,720	59	43	59	43	4,036		
CHINA, PEOPLES R		32	0	32	0	1,090	77	0	77	0	1,152		
OTHER		80	54	80	54	689	169	133	169	133	1,330		
Subtotal:-----		180	107	180	107	5,498	305	177	305	177	6,518		
DRD FIG(SEP)	MT												
EC 12		0	21	0	21	969	0	55	0	55	2,403		
GREECE		0	21	0	21	943	0	55	0	55	2,403		
TURKEY		0	169	0	169	1,240	0	129	0	129	1,300		
OTHER		236	515	236	515	562	100	220	100	220	266		
Subtotal:-----		236	705	236	705	2,771	100	405	100	405	3,969		
DRD RAISIN(AUG)	MT												
MEXICO		736	1,193	1,200	1,710	3,662	469	1,038	768	1,482	2,508		
CHILE		37	143	273	378	1,441	84	178	320	467	1,774		
TURKEY		81	116	158	282	1,526	84	135	166	292	1,655		
OTHER		0	21	24	44	87	0	23	48	60	134		
Subtotal:-----		854	1,473	1,656	2,415	6,717	587	1,374	1,302	2,301	6,070		
FRUIT JUICE(SSE)													
APPLE JUIC(JUL)	KL												
EC 12		5,642	9,960	13,949	43,527	229,468	2,309	2,252	5,886	9,772	69,762		
ARGENTINA		11,724	42,564	81,161	139,143	222,727	3,437	8,301	25,977	26,600	58,379		
GERMANY		4,393	5,252	10,357	28,609	186,794	1,833	1,217	4,339	6,557	56,118		
OTHER		35,897	27,667	103,821	140,905	369,967	12,604	6,343	38,333	31,195	118,171		
Subtotal:-----		53,263	80,190	198,930	323,576	822,162	18,350	16,895	70,196	67,567	246,312		
FCOJ(DEC)	KL												
BRAZIL		91,501	137,964	729,353	754,338	973,422	18,412	28,489	203,742	122,732	249,284		
OTHER		4,907	10,091	91,939	113,825	102,028	1,126	1,897	30,449	21,121	32,627		
Subtotal:-----		96,407	148,056	821,291	868,163	1,075,450	19,538	30,386	234,191	143,854	281,912		
GRAPE JU(JAN)	KL												
ARGENTINA		19,452	15	76,184	4,000	90,118	7,199	25	27,999	1,818	33,525		
OTHER		25,920	11,967	73,212	106,511	97,332	3,488	3,488	36,192	36,192	36,451		
Subtotal:-----		25,920	11,982	149,395	110,350	187,449	9,822	3,513	55,879	38,017	69,979		
PNEAPL JUCH(JAN)	KL												
THAILAND		5,732	6,286	113,904	129,478	133,453	1,435	887	30,375	25,659	34,845		
PHILIPPINES		10,915	7,934	95,165	83,812	128,027	2,188	1,694	19,092	17,804	26,052		
OTHER		2,066	1,471	17,674	19,795	23,132	673	482	6,302	5,551	9,942		
Subtotal:-----		18,713	15,692	226,742	233,085	284,613	4,297	3,063	55,769	49,013	68,839		
PNEAPL JUNC(JAN)	KL												
PHILIPPINES		2,011	2,271	21,815	22,329	28,920	745	842	8,326	8,292	10,958		
JAPAN		0	0	7,206	9,172	12,935	0	0	3,144	1,836	4,696		
OTHER		165	188	3,657	1,388	6,249	112	120	1,566	762	2,176		
Subtotal:-----		2,176	2,459	32,678	32,889	48,104	858	962	13,036	10,890	17,830		
FROZEN FRUIT													
FZN STRBRY(DEC)	MT												
MEXICO		605	335	18,553	18,152	19,087	512	262	16,433	17,018	16,855		
OTHER		490	169	1,220	1,092	1,378	450	169	4,284	3,291	4,823		
Subtotal:-----		1,095	504	19,773	19,244	20,465	962	431	20,717	20,309	21,678		

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR		
FRESH VEGETABLES													
FR BEANS(OCT)	MT												
MEXICO		27	7	9,999	11,424	9,999	23	6	10,774	14,214	10,774		
OTHER		55	115	602	729	602	61	110	530	783	530		
Subtotal:-----		81	122	10,601	12,152	10,601	85	115	11,305	14,998	11,305		
FR CARROT(OCT)	MT												
CANADA		6,746	6,422	49,049	39,943	49,049	1,709	1,604	14,001	10,429	14,001		
MEXICO		168	664	15,868	10,923	15,868	38	166	4,051	3,267	4,051		
OTHER		61	20	374	566	374	47	13	163	370	163		
Subtotal:-----		6,974	7,106	65,291	51,432	65,291	1,795	1,783	18,216	14,067	18,216		
FR CABBAGE(OCT)	MT												
CANADA		1,430	2,063	11,872	17,625	11,872	280	556	3,184	4,420	3,184		
MEXICO		101	671	9,168	8,318	9,168	13	94	1,385	1,542	1,385		
OTHER		9	40	509	871	509	1	29	381	565	381		
Subtotal:-----		1,540	2,774	21,549	26,815	21,549	294	679	4,951	6,526	4,951		
FR CELERY(OCT)	MT												
MEXICO		0	0	8,794	11,581	8,794	0	0	2,459	4,719	2,459		
CANADA		2,075	2,557	5,266	4,643	5,266	644	786	1,641	1,340	1,641		
OTHER		53	38	926	600	926	9	8	155	117	155		
Subtotal:-----		2,127	2,595	14,986	16,823	14,986	653	794	4,255	6,176	4,255		
FR CUCUMBR(OCT)	MT												
MEXICO		1,585	675	150,901	213,505	150,901	693	386	61,213	76,639	61,213		
OTHER		465	471	23,981	25,337	23,981	357	455	8,679	8,554	8,679		
Subtotal:-----		2,050	1,146	174,881	238,842	174,881	1,051	841	69,892	85,192	69,892		
FR CAULFLWR(OCT)	MT												
CANADA		1,524	1,619	4,294	3,018	4,294	493	538	1,432	998	1,432		
MEXICO		0	0	4,942	666	4,942	0	0	1,082	319	1,082		
OTHER		0	0	125	192	125	0	0	61	133	61		
Subtotal:-----		1,524	1,619	9,360	3,876	9,360	493	538	2,575	1,449	2,575		
FR GARLIC(OCT)	MT												
MEXICO		16	36	11,287	10,500	11,287	33	122	11,188	11,055	11,188		
ARGENTINA		0	0	2,389	2,225	2,389	0	0	2,843	2,490	2,843		
OTHER		818	5,509	5,078	16,447	5,078	624	2,400	9,939	9,939	4,649		
Subtotal:-----		834	5,545	18,754	29,172	18,754	657	2,522	18,679	23,145	18,679		
FR ONION(OCT)	MT												
MEXICO		2,836	3,315	151,526	192,287	151,526	2,450	2,703	91,466	93,837	91,466		
OTHER		1,740	6,097	37,884	24,451	37,884	755	1,790	17,745	10,015	17,745		
Subtotal:-----		4,577	9,412	189,410	216,739	189,410	3,205	4,493	109,211	103,853	109,211		
FR PEPPERS(OCT)	MT												
MEXICO		5,676	3,871	107,856	138,708	107,856	4,723	2,694	109,276	134,106	109,276		
EC 12		1,012	1,687	9,736	16,090	9,736	234	3,241	25,346	37,118	25,346		
NETHERLANDS		981	1,636	9,507	15,624	9,507	2,263	3,129	25,154	35,960	25,154		
OTHER		564	1,145	2,493	3,994	2,493	578	1,133	5,125	6,733	5,125		
Subtotal:-----		7,252	6,703	120,085	158,793	120,085	7,641	7,069	140,347	177,957	140,347		
FR SEED POT(OCT)	MT												
CANADA		147	64	55,174	74,524	55,174	24	16	7,805	11,499	7,805		
OTHER		17	33	58	137	58	13	24	54	81	54		
Subtotal:-----		164	97	55,232	74,661	55,232	36	41	7,859	11,579	7,859		
FR TBL POT(OCT)	MT												
CANADA		9,198	14,784	98,431	227,512	98,431	1,401	2,740	16,465	38,014	16,465		
OTHER		0	0	92	13	92	0	0	75	3	75		
Subtotal:-----		9,198	14,784	98,523	227,525	98,523	1,401	2,740	16,539	38,017	16,539		
FR TOMATO(OCT)	MT												
MEXICO		10,994	14,648	202,839	365,168	202,839	5,597	9,244	132,004	289,182	132,004		
OTHER		605	1,027	12,003	15,744	12,003	6,128	10,516	11,176	18,273	11,176		
Subtotal:-----		11,599	15,675	214,842	380,912	214,842	6,128	10,516	143,179	307,454	143,179		
FR ASPARG(OCT)	MT												
MEXICO		318	314	19,877	22,613	19,877	324	318	26,987	31,593	26,987		
OTHER		613	1,304	5,524	7,239	5,524	575	1,314	6,070	7,620	6,070		
Subtotal:-----		931	1,618	25,401	29,852	25,401	899	1,631	33,058	39,213	33,058		
CANNED VEGETABLES													
CND TOM PST(JUL)	MT												
MEXICO		0	0	0	193	20,312	0	0	0	129	14,818		
CHILE		869	151	3,056	429	1,176	424	107	1,656	305	4,122		
OTHER		697	705	1,166	1,618	3,881	384	422	811	1,082	2,789		
Subtotal:-----		1,565	856	4,222	2,241	31,369	808	529	2,467	1,516	21,730		
CND TOM SAUCE(JUL)	MT												
CANADA		97	73	293	1,528	4,465	58	85	174	913	2,499		
CHILE		22	72	48	193	2,239	9	49	21	111	1,325		
DOMINICAN REPUB		260	85	494	165	1,627	173	59	324	114	1,050		
OTHER		98	152	421	308	1,552	129	67	369	264	1,115		
Subtotal:-----		477	381	1,256	2,194	9,883	368	260	887	1,402	5,989		
CND TOMATO(JUL)	MT												
CHILE		1,662	1,087	4,849	3,866	16,630	710	497	1,883	1,862	7,462		
EC 12		668	1,374	3,455	2,884	16,765	266	447	1,637	879	6,087		
ITALY		668	1,374	2,769	2,800	15,560	266	447	1,117	849	5,398		
OTHER		2,220	1,616	3,396	5,155	11,901	670	598	1,249	1,917	4,363		
Subtotal:-----		4,550	4,077	11,700	11,904	45,297	1,645	1,541	4,769	4,657	17,912		
CND MSHROOM(JUL)	MT												
INDONESIA		1,234	879	3,993	3,015	15,958	3,233	2,032	10,972	6,894	39,390		
CHINA, PEOPLES R		907	1,298	3,013	3,623	11,240	1,629	2,150	5,102	6,245	19,532		
OTHER		1,307	1,126	4,453	3,820	21,018	3,164	3,002	10,229	9,285	45,934		
Subtotal:-----		3,448	3,303	11,459	10,458	48,216	8,025	7,184	26,303	22,424	104,856		
FROZEN VEGETABLES													
FZN BROCLI(SEP)	MT												
MEXICO		12,103	6,838	12,103	6,838	159,838	8,233	4,359	8,233	4,359	106,192		
OTHER		2,154	2,604	2,154	2,604	15,008	1,699	1,673	6,699	1,673	10,933		
Subtotal:-----		14,256	9,442	14,256	9,442	175,246	9,931	6,032	9,931	6,032	117,125		
FZN CAULFLR(SEP)	MT												
MEXICO		1,384	1,403	1,384	1,403	20,199	959	1,059	959	1,059	14,433		
OTHER		180	354	180	354	1,899	136	197	136	197	1,249		
Subtotal:-----		1,564	1,757	1,564	1,757	22,097	1,096	1,256	1,096	1,256	15,682		
FZN POTATO(SEP)	MT												
CANADA		5,909	9,626	5,909	9,626	121,553	3,452	5,424	3,452	5,424	66,834		
OTHER		5,941	9,628	5,941	9,628	121,956	3,493	5,437	3,493	5,437	67,093		
Subtotal:-----													

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U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN MARKETING YEAR BEGINNING AS INDICATED													
COMMODITY AND COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)						
		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	YR TOT CURR YR	LAST YEAR
TREE NUTS													
PISTACHIO NSH(SEP)		MT											
HONG KONG		0	0	0	0	40	0	0	0	0	0	0	81
TURKEY		0	15	0	15	7	0	42	0	42	0	42	24
OTHER		0	0	0	0	0	0	1	0	1	0	1	2
Subtotal:-----		0	15	0	15	47	0	43	0	43	0	43	107
CASHEW NUT(AUG)		MT											
INDIA		3,132	3,456	5,732	5,908	31,066	14,623	14,660	27,315	25,276	136,033	109,075	109,075
BRAZIL		1,881	2,253	4,489	4,690	27,735	7,454	8,784	17,967	103,497	18,462	19,312	19,312
OTHER		743	479	1,389	744	5,845	2,535	1,520	4,944	2,396	2,396	2,396	2,396
Subtotal:-----		5,756	6,188	11,610	11,343	64,645	24,611	24,964	50,226	46,134	264,421	264,421	264,421
FILBERTS(AUG)		MT											
TURKEY		74	365	167	663	3,944	220	954	466	1,752	10,245	10,245	10,245
OTHER		10	3	13	8	77	43	12	62	32	300	300	300
Subtotal:-----		84	368	181	671	4,022	263	967	528	1,784	10,544	10,544	10,544
PECANS NSH(SEP)		MT											
MEXICO		863	110	863	110	12,772	1,557	117	1,557	117	33,861	33,861	33,861
OTHER		96	327	96	327	148	259	1,081	1,081	1,081	1,081	1,081	1,081
Subtotal:-----		959	437	959	437	12,920	1,816	1,197	1,816	1,197	34,942	34,942	34,942
WINES													
CHAMP&SPRK WN(JAN)		KL											
EC 12		2,632	2,897	16,914	15,914	30,362	23,102	29,043	144,088	145,658	248,990	248,990	248,990
FRANCE		711	1,077	5,396	5,732	9,270	14,633	20,994	95,156	103,497	158,356	158,356	158,356
ITALY		968	1,218	6,589	5,629	12,155	4,561	5,457	29,503	24,653	54,544	54,544	54,544
OTHER		22	22	194	194	379	200	81	1,165	646	1,629	1,629	1,629
Subtotal:-----		2,654	2,919	17,171	16,109	30,742	23,303	29,124	145,252	146,304	250,618	250,618	250,618
FT&VERM WN(JAN)		KL											
EC 12		709	1,178	11,790	8,275	14,354	3,711	4,706	42,194	31,658	52,568	52,568	52,568
ITALY		265	686	7,309	4,604	8,526	502	1,653	18,353	11,096	20,846	20,846	20,846
SPAIN		352	371	3,141	2,243	3,917	2,369	1,846	14,356	10,143	17,585	17,585	17,585
WINES													
FT&VERM WN(JAN)		KL											
PORTUGAL		53	79	755	766	1,082	556	903	6,533	7,378	10,008	10,008	10,008
OTHER		15	15	88	117	138	66	60	415	474	597	597	597
Subtotal:-----		724	1,194	11,880	8,393	14,493	3,777	4,766	42,610	32,132	53,165	53,165	53,165
OTH GP WINE(JAN)		KL											
EC 12		270	250	81,827	3,178	83,216	495	352	322,712	5,455	325,365	325,365	325,365
FRANCE		68	18	28,501	302	28,726	157	106	176,525	1,492	177,454	177,454	177,454
ITALY		139	216	41,117	2,277	41,996	240	229	110,375	3,146	111,738	111,738	111,738
OTHER		134	53	18,394	412	18,656	268	71	39,627	574	40,027	40,027	40,027
Subtotal:-----		404	303	100,223	3,591	101,873	754	423	362,339	6,029	365,392	365,392	365,392
OTH WN PROD(JAN)		KL											
JAPAN		205	106	1,760	1,761	2,381	641	343	5,059	5,385	6,900	6,900	6,900
EC 12		290	303	3,289	2,557	4,423	473	426	4,855	3,513	6,438	6,438	6,438
SPAIN		57	125	1,213	509	1,663	101	177	1,799	737	2,429	2,429	2,429
OTHER		95	428	5,545	2,596	787	179	553	1,044	4,065	4,530	4,530	4,530
Subtotal:-----		590	836	5,594	6,913	7,592	1,293	1,322	10,958	12,963	14,868	14,868	14,868
CUT FLOWERS													
ROSES(JAN)		NONE											
COLOMBIA		0	0	0	0	0	4,045	4,637	54,060	64,053	66,855	66,855	66,855
OTHER		0	0	0	0	0	1,643	1,612	18,710	21,191	23,586	23,586	23,586
Subtotal:-----		0	0	0	0	0	5,688	6,249	72,771	85,244	90,442	90,442	90,442
CARNATIONS(JAN)		NONE											
COLOMBIA		0	0	0	0	0	5,758	5,805	63,181	60,669	83,144	83,144	83,144
OTHER		0	0	0	0	0	139	167	2,487	1,664	2,964	2,964	2,964
Subtotal:-----		0	0	0	0	0	5,897	5,972	65,668	62,333	86,108	86,108	86,108

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